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ABSTRACT

This manual aids in developing cross-agency and cross-disciplinary inservice training in the areas of transition and supported employment for moderately and severely disabled individuals. Using a "train-the-trainer" approach, the manual outlines goals and objectives and presents strategies for designing inservice workshops and training materials. Section titles and authors include: "Inservice Training in Human Services Agencies and Organizations" (Mike Barcus et al.); "Building Teams among Agencies and Disciplines" (Howard Garner); "Delivering Inservice Training: Effective Audio-Visual Aids, and Room Arrangements" (Tony Dalton et al.); "Guidelines for Training Parents as Part of Interagency Transition Planning Teams" (M. Morton et al.); "Employment Oriented Vocational Skills Training" (Jane Everson et al.); "Interagency Transition Planning Training" (Jane Everson et al.); and "Supported Competitive Employment Training" (Mike Barcus et al.). Each section identifies a target audience for training, defines the role of the staff trainer, delineates goals and objectives to be achieved by staff training, presents a sampling of activities and materials which trainers may use and adapt for inservice training, and lists references and further resources. (JDD)

SUCCESSFUL TRANSITION EQUALS PROCESS PLUS OUTCOMES

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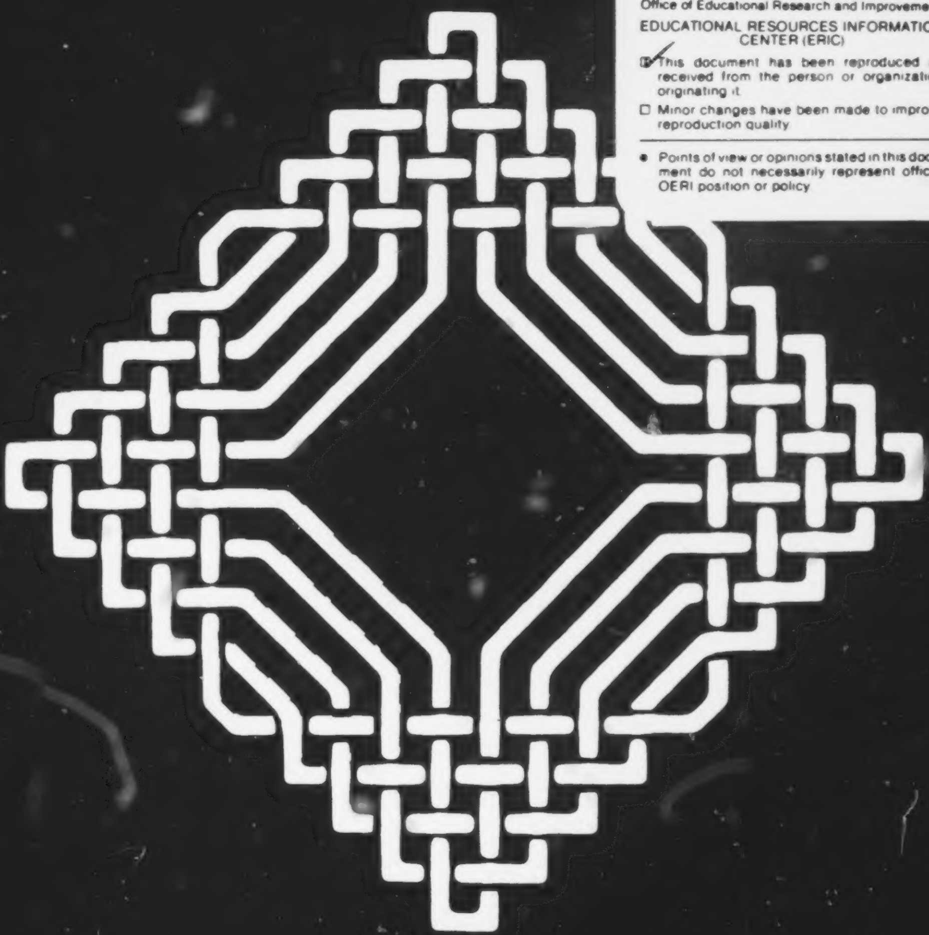

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PROJECT TIE

Achieving Outcomes: A Guide to Interagency Training in Transition and Supported Employment

1987

Edited by:

Jane M. Everson
Mike Barcus
Sherril Moon
M.V. Morton

With invited contributions by:

Kay Barnes, Gay Bowen, Martha Brookes, Ginger Clubine
Tony Dalton, Howard Garner, Steve Hall, Ann James
Kethya Jones, Corey Moore, Andree Stanford, and Brett Wilson

Project Transition Into Employment
Rehabilitation Research and Training Center
School of Education
Virginia Commonwealth University
Richmond, Virginia 23284-0001

EC 210255

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Jane M. Everson
Mike Barcus
Sherril Moon
M. V. Morton

April 15, 1987

Introduction

One of the most critical issues in the transition and supported employment movement today is the shortage of trained personnel who are knowledgable about program development, service delivery, program evaluation, and systems change. McAlees (1984) stated that proposed development and expansion of secondary and adult employment programs for individuals with moderate and severe disabilities through the 1990's will require the preparation of almost 15,000 professionals. The shortage of trained personnel is a cross-disciplinary and cross-agency issue evidenced not only in the lack of well-trained program administrators and service providers, but also in the lack of skilled trainers to provide both preservice and inservice training.

Recent funding from the Office of Special Education and Rehabilitative Services (OSERS) has served as a catalyst for the development of numerous state and national training efforts to train staff at both the preservice and inservice levels. Additionally, funding priorities from both OSERS and the Administration on Developmental Disabilities (ADD) as well as federal legislative reauthorizations have created a pressing need to re-train existing professional staff to more appropriately serve individuals with moderate and severe disabilities. Until recently, minimal efforts have been directed toward the development of skilled trainers to provide this much needed inservice or preservice training in the areas of transition and supported employment.

The purpose of this manual is to present a "train the trainer" approach to cross-agency and cross-disciplinary inservice training in the areas of transition and supported employment. The manual is intended for use by staff trainers who are confronted with the need to train professional staff and parents from a variety of backgrounds, experiences, and beliefs under the demanding conditions of inservice training. By adopting this "train the trainer" approach, we hope that existing staff trainers across the disciplines and agencies of special education, vocational special needs education, vocational rehabilitation, social work, mental health, and mental retardation, as well as parent advocates, will be able to more accurately identify and address the pressing needs of professionals currently serving individuals with moderate and severe disabilities.

Section I presents an overview of inservice training as it applies to cross-agency and cross-disciplinary training in the areas of transition and supported employment. A critical component of inservice training for professionals and parents is an application of the principles of adult learning. A skilled trainer of adults must be aware of and incorporate these principles into inservice training in order to best meet the needs of the targeted audience. Section II provides guidelines and strategies for building interagency teams during inservice workshops. Section III presents guidelines for trainers in the development and use of audio visual materials and equipment. In Section IV, we asked for input from parents of transition-aged youth who had participated in Project TIE training. Their suggestions for involving parents in inservice workshops will assist trainers in more clearly meeting parents' needs.

Sections V, VI, and VII focus upon inservice training in the areas of: (V) employment oriented vocational skills training; (VI) interagency transition planning training; and (VII) supported competitive employment training. Each section identifies a target audience for training, defines the role of a staff trainer, delineates goals and objectives to be achieved by staff training, and presents a sampling of activities and materials which trainers may use and adapt for inservice training. Each section also includes a list of references and further resources to assist trainers in expanding their expertise and in developing their own training materials.

The purpose of this manual is to outline the goals and objectives trainers must include in the areas of inservice training for transition and supported employment and to present strategies for designing inservice workshops and developing training materials. It is not intended as a "cookbook" which trainers may use verbatim to present inservice workshops. Therefore, activities and materials are presented as samples only; it is expected that trainers will wish to modify and expand these sample materials based on their own training styles and on the needs of their trainees.

Jane M. Everson

Mike Barcus

Sherril Moon

M. V. Morton

Project Transition Into Employment (TIE)

April 15, 1987

Project TIE Course Participants By State

ALABAMA

Cary Boswell
Bill Caughran
Gary Edwards
Ann James

DELAWARE

Barbara Bennett
Gay Bowen
Martha Brookes
Denise Burion
Adam Fisher
Andrea Guest
Joan Mabrey
Sandra Snider
Melvin Verosko

IDAHO

Norma Turnbeaugh
Chris Jones
Russ McCoy
Jeff Crumrine
Sheila Palmer
Nick Arambarri
Mike & Karen Ryals
Jani Lambrou
Clark Adamson
Kevin Nathan
Gary Pickrel
Ron King
Gary Hammons
Paula Lambert
Doug Marquette
Bob Graham
Sarah Davidson
Dana Neely
Maureen Niland
Thomas Busacker
Karen Ball
Eloise Van Slyke
Russ Spearman
Becky Morgan
Bob Reidelberger
Charlotte Dasenbrock
Sally Pose
Pete Martinez
Keith Knight
RaeNette Henson
Jeananne Whitmer

KANSAS

Michael Byington
Ginger Clubine
Carolyn Olson
Joe Scarlett
Marguerite Thorsell
Chuck Tyrrell

MAINE

Michael Kotch
Maureen Keeley
Robert Franciose

MARYLAND

Pecolia Blackwell
Ruth Brown-Pear
Lorraine Flowers
Rosanne Hammes
Jean Hebeler
Lucy Hession
Pat Lantz
Corey Moore
Steve McAbee

NORTH CAROLINA

Bob Creech
Tony Dalton
Susan Gurganus
Rebecca McDonald
Duncan Munn
Sillar Smith
Andree Stanford

PENNSYLVANIA

Steve Banks
Eleanor Biconich
John S. Brown
Adele Sternberg

SOUTH CAROLINA

Earle Pope
Pat McCarthy
Sam Davis
Kathy Wagner
Cynthia Newberry

TENNESSEE

Susan Dupree
Elma Bellephant
James Brooks
Sam McClanahan
Keytha Jones

VIRGINIA

David Aldrich
Kay Barnes
Tom Bass
Jeff Byrne
Vance Horne
Mary Kelvin
Diane Talarico

WASHINGTON, D.C.

Sheri DeBoe
James Gillespie
Gail Hilliard-Nelson
Aline St. Dennis
Margaret Tyus

WEST VIRGINIA

Sandra Barkey
Mary Lou Busch
Bob Chamberlain
Iva Dean Cook
Jean-Cary Davis
Ben Dickens
Jacqueline Ferguson
Loretta Hagler
William Phelps
David Quattro
Terry Smith

WYOMING

Shirley Knox
Mary Boynton
Brett Wilson
Renae Humburg

List of Monograph Contributors

Kay Barnes is a staffperson for the Parent Resource Training Center in Hampton, Virginia.

Gay Bowen is a former parent advocate for the Association for Children and Adults with Learning Disabilities (ACLD) in Millsboro, Delaware.

Martha Brookes is the Director of the Transition Project in Newark, Delaware.

Ginger Clubine is a Supported Employment Specialist with the Office of Mental Retardation in Harrisburg, Pennsylvania.

Tony Dalton is a Senior Staff Trainer with the Developmental Disabilities Training Institute at the University of North Carolina in Chapel Hill, North Carolina.

Howard Garner is the Director of the Virginia Institute for Developmental Disabilities (VIDD) at Virginia Commonwealth University in Richmond, Virginia.

Steve Hall is a doctoral student at Virginia Commonwealth University, and a Training Associate with the Rehabilitation Research and Training Center at Virginia Commonwealth University in Richmond, Virginia.

Ann James is a parent advocate for the Association for Children and Adults with Learning Disabilities (ACLD) in Montgomery, Alabama.

Kethya Jones is a Mental Retardation Program Specialist with the Department of Mental Retardation in Nashville, Tennessee.

Corey Moore is the Parent Information Education Coordinator with the Montgomery Association of Retarded Citizens in Rockville, Maryland.

Brett Wilson is the Program Coordinator for the state of Wyoming Planning Council on Developmental Disabilities in Cheyenne, Wyoming.

Section I

Inservice Training in Human Services Agencies and Organizations

By

Mike Barcus
Jane M. Everson
Steve Hall

Inservice Training in Human Services Agencies and Organizations

Why is Inservice Training so Important for Agencies and Organizations who Provide Transition and Employment Services?

Well trained personnel are a critical element of coordinated interagency human services in agencies and organizations which collaborate to provide transition and employment services for consumers with moderate and severe disabilities. The technology for planning and providing these services has grown tremendously over the past twenty years making it difficult, if not impossible, for service providers and program administrators who currently work in this area to keep abreast of current philosophy and practices. Even at the university and college preservice level, there are not enough personnel preparation programs to prepare the needed numbers of community-based vocational trainers, transition specialists, and supported employment specialists (Renzaglia, 1986; Weissenstein, 1986; Will, 1984). Furthermore, preservice programs require a lengthy preparation time for personnel which may delay application of new practices for as long as four years until students graduate from college and university programs.

An immediate need for transition and supported employment specialists has resulted in a large number of existing personnel assuming new transition and supported employment responsibilities for consumers with moderate and severe disabilities (Renzaglia, 1986). In many cases, these personnel are also being asked to train newly hired staff from a variety of disciplines and agency backgrounds to provide transition and supported employment services. The shortage of trained personnel, both as staff trainers and program coordinators, is a growing concern (Fifield & Smith, 1985) because education and adult services programs are increasingly being asked to reflect new community-based, interagency collaborated, and supported employment mandates in their daily operations (Karen & Knight, 1986).

As a result, human service agencies and organizations have been confronted with a need to provide immediate conceptual and practical skill training to their personnel. The most immediate method of providing staff training is through inservice training, either provided directly by the staff in the agency or organization or contracted through another organization or university. Inservice training, unlike long-term preservice programs, provides immediate attention to staff and consumer needs and offers a unique opportunity for on-site technical assistance both during inservice training and as a follow-up to training.

Human service agencies have used inservice staff training as a way to enhance the continued growth and development of the organization and its personnel (Laird, 1985; Nadler, 1985). Often, the impetus for inservice training is a reactionary response to current implementation problems rather than a proactive attempt to identify and prevent future problems (Bernstein & Zarnik, 1982). Thus, inservice training programs have become a common intervention strategy for attempting to change the current performance of direct service personnel working with persons with disabilities (Bernstein & Zarnik, 1982) and/or to prepare new staff to perform their newly identified jobs (Cafferella, in press). In other cases, a need for inservice training may have been identified by an external evaluator during a program evaluation as a way to more adequately meet a program's service objectives.

In both cases, recipients of inservice training and providers of inservice training may perceive different objectives for the proposed training. In order to merge potentially conflicting objectives, an inservice trainer[1] must: 1) assess the needs of the targeted recipients; 2) assess the desired outcomes of the decision makers; 3) summarize the needs of the recipients with the desired outcomes of the decision makers; and 4) define comprehensive and measurable goals for the proposed inservice training.

What are the Objectives of Inservice Training?

Generally, the objectives of inservice training efforts are for the participants to change attitudes, acquire new knowledge, and/or to develop or enhance technical skills (Laird, 1985; Bernstein & Zarnik, 1982). The objectives should not be based solely upon the trainer's own personal agenda for training. Instead, a skilled and effective inservice trainer is someone who is able to assess the needs of the recipients and match them with his or her own values and knowledge base. Ultimately, the desired outcome of inservice training is for the participants to internalize new knowledge and to be able to apply what has been learned to their specific professional needs.

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[1] A singular noun, a trainer, has been used throughout this manual for ease in writing; however, the authors recognize that in many workshops, two or more trainers would be involved. Regardless of the number of trainers utilized, the procedures for inservice development and implementation would be similar.

This is a very different outcome from just providing new knowledge because it requires the trainer to assess training needs, provide knowledge, and to facilitate application of the new knowledge and practices in the recipients' professionals endeavors. The training format and techniques to be used will depend upon whether the assessed needs of the participants and the desired outcomes of the decision makers are: 1) to acquire new knowledge; 2) to develop new skill competencies; 3) to change current values and attitudes; or 4) a combination of two or more of the above (Cafferella, in press; Knowles, 1980; Robinson, 1979; and McKinley, 1980).

The identification and formulation of specific objectives for the proposed inservice training requires careful assessment of the organization and targeted participants and planning of specific objectives before training is actually provided to participants. Additionally, an effective trainer must present the identified training objectives to participants during the initial phase of training, and use the objectives to organize and focus the training content and activities. The following questions illustrate typical criteria for identifying and planning objectives of inservice training.

Guidelines for Identifying and Planning Inservice Objectives

1) Have all proposed recipients of the planned inservice training been identified?

2) Have all identified recipients been asked to provide their input on their needs and expectations of the planned inservice training prior to planning the content?

3) Have all agency or organization decision makers been asked to provide their input on their needs and expectations of the planned inservice training prior to planning the content?

4) Have all political and public relations concerns related to the planned inservice been identified and addressed? (e.g., Is the inservice an attempt to meet accreditation standards? appease parent or consumer groups? deflect the public eye from a previous incident or scandal? assure new or existing funding?)

5) Have you as the proposed trainer been able to merge the agency or organization's values and philosophy with your own? If not, are these issues which you are willing and able to address during training?

6) Have you identified a commitment from the agency or organization to implement new practices and apply new knowledge as a result of the planned inservice?

7) Have you identified and planned objectives which are both measurable and achievable during the timeframe you have allotted for inservice training?

8) Do you as the proposed trainer have both the knowledge and the skills to provide the targeted inservice training?

Adults As Learners

Many professionals who are called upon to conduct inservice training have not been trained as "trainers of adults". Instead, they may have experience and training as educators of children or they may have developed training procedures by modeling techniques used by effective trainers they have had the opportunity to observe. Human services trainers have seldom received specific training in adult education and principles of adult learning. As we all will probably agree, "good" service providers and administrators do not always make "good" trainers! Successful inservice trainers recognize the difference between how children learn and how adults learn and incorporate these principles into both the design and implementation of inservice training (Knowles, 1980; and Boyle, 1981).

Caffarella (in press), McDaniel, Flippo, and Lowery (1986), and Knowles (1980) have outlined several specific principles and practices of adult learning which inservice trainers should address when planning and implementing training.

Principles of Adult Learning in Inservice Training

1) People of all ages are capable of and eager to learn new information.

2) Adults have different styles of learning which require a variety of instructional techniques.

3) Adults come to learning situations with a rich reservoir of experiences. Therefore, they will learn best when new information builds on their past knowledge and experiences.

4) Adult learners perceive themselves as autonomous and self-reliant people and reflect these perceptions in their learning expectations.

5) Adults' willingness to learn is influenced by a combination of complex innate and and extraneous forces which inhibit and encourage their learning expectations.

6) Adults enter learning situations with their own agendas (personal goals and objectives) which may or may not be the same as those the trainer holds for the inservice.

7) Adults are frequently more motivated to learn if they participate actively in the learning process.

8) Adult learners are concerned with actual practice and want to apply their learning to present situations.

9) Adults are easily threatened and learn best in a situation that is both environmentally and psychologically comfortable.

Adapted from Caffarella (in press), McDaniel, Flippo, and Lowery (1986), and Knowles (1980)

In our society, the role of a learner has most frequently been associated with childhood and dependency (McKinley, 1980; Knowles, 1980). Adult inservice participants typically do not view their primary role as traditional learners. Unfortunately, many inservice trainers assign a passive role to adult learners simply because they fail to apply principles of adult learning to participants. Typically, this approach to learning has promoted the idea that a learner's role is to receive knowledge which is to be saved for future application. This "banking education" approach, where participants are given information that must be held for future use, does not create an environment conducive to adult learning (Friere, 1983). Adults want to apply their learning to present situations not future situations (Knowles, 1980; Cafarella, in press). They are stimulated to learn information that is immediately applicable and often reject any information that does not meet this expectation.

Promoting the conditions and opportunities for adults to learn is a critical component of effective inservice training. The environment must be conducive to a mutual exchange of ideas. Inservice training is not a place for a trainer to exercise power, authority, or control. Nor is it a place for a trainer to "tell" participants the "only" way to implement a practice or procedure or to pass judgment on an existing program or practice.

The conditions and environment of the training room can inadvertently send messages to the participants about the trainer's expectations of the training. We feel that it is a trainer's responsibility to assure that the training environment reflects flexibility and overall freedom and that the environment respects the choices of the adult learner. Specific suggestions for room arrangements will be addressed in more detail in Section III of this manual, Delivering Effective Presentations. However, it is critical that the trainer establish "setting congruence" between her or himself and the participants. Small desks, no refreshments, sterile rooms, rigid scheduling, podiums, lecturns, and other "distancing phenomena" upset the natural learning modality of the participants and defeat the mutual exchange of ideas.

Adults view learning as a process of developing increased competence both in knowledge and practices. Adult inservice participants may justifiably reject learning environments with controlled outcomes which resemble environments for children.

Adult inservice participants view themselves as independent and self-reliant; most enter a learning situation with some conceptual view of the material being presented (Houle, 1972; Knowles, 1980; Boyle, 1981; McDaniel, Flippo, and Lowery, 1986). Participants may feel that they already have sufficient skills and knowledge in the area targeted for inservice training and may resent their forced participation in the inservice workshop (McKinley, 1980). In order for learning to occur, the trainer must quickly establish a setting which respects and accepts participants as knowledgeable and experienced professionals. The trainer must always be aware that no matter how carefully she or he assessed participants' needs and objectives, each participant will come to the inservice session with her or his own personal views and objectives (Knowles, 1980). Throughout the inservice training, these views and hidden objectives may surface as conflicts with the trainer's stated objectives (McDaniel et al., 1986).

Adult participants, particularly in interagency training efforts, will each have a different set of experiences and terminology from which she or he will attempt to organize and understand the training (McKinley, 1980). All too often, however, trainers fail to recognize the participants' experiences as a vast resource for their training efforts and instead attempt to "fill" participants with new knowledge. When adult learners are recognized for their experiences and strengths, the trainer welcomes their real life situations into the inservice session. This transforms the session from an academic lecture into an on-site and applied experience. The inservice setting becomes a hands-on working space within the adult learner's immediate environment. The most effective trainers remember this cardinal rule, ADULTS ARE ACTIVE USERS AND NOT JUST RECIPIENTS OF KNOWLEDGE, and they apply it at every opportunity they can throughout inservice training. When planning the content and activities of inservice training, the guidelines below summarize key points that a trainer should keep in mind in order to incorporate principles of adult learning.

Key Points in Planning Inservice Training which Incorporates Adult Learning Principles

1) Plan a learning environment which respects and supports all participants. Example: comfortable chairs, large tables, freedom of movement.

2) Include participants in all phases of the inservice training. Example: Take the time to ask participants what they know about the presented material.

3) Recognize and utilize participants' experiences as resources. Example: Ask the participants for examples.

4) Plan for each participant to assume responsibility for his or her own learning by providing a structure for developing individual action plans. Example: Offer examples of various plans that have been used in the past.

5) Plan opportunities for participants to apply their new knowledge and skills during the workshop. Example: Role playing, small group discussions.

6) Prepare examples of application in a variety of applied settings and encourage brainstorming of settings and examples where difficulty in applying the information might occur. Example: Ask participants for barriers they might experience in their own programs.

7) Incorporate individual participant objectives that emerge during the training with your objectives; modify the inservice agenda accordingly. Example: Seek consensus from the group on new objectives that emerge and remove unnecessary agenda items.

Adult Learning Principles (Continued)

8) Plan a physical environment that matches the structure and format of the inservice's objectives. Example: Let the environment match the participants' needs. Include the typical chalkboards, individual seating, and individual training aides only if needed.

9) Combine a variety of instructional methods (e.g., lecture, small group activities, problem solving activities, games, media, etc.).

10) Provide structure for assessing the training programs throughout the inservice workshop. Example: Include formal and informal assessment during the session instead of a single one at the end of the session.

11) Be prepared to use alternative methods for participants to understand the information. Example: Use overheads, videos, slides, lectures, group participation, role play, games or other uncommon innovative adult learning activities. Present the key concepts in a number of different ways.

12) Provide participants with ample opportunities to assimilate the information through summary activities and applied situations. Example: Generate products that can be used in their work environment.

13) Plan information in a sequential, incremental fashion to avoid information overload. Example: Connect information and use flashback and foreshadowing techniques to give the presentation completeness.

14) Plan ample opportunity for participants to share their experiences with other participants. Example: Informal gatherings, parties, area tours, lunches, and dinners can provide unique and comfortable opportunities.

Steps in Developing and Implementing Interagency Inservice Training in Transition and Supported Employment Training

Weissman-Frisch, Crowell & Inman (1980) have recommended four broad guidelines for designing and implementing inservice training. These guidelines are: 1) use a multiple evaluation approach; 2) serve only a few participants during each training session; 3) utilize a variety of instructional strategies; and 4) follow a competency-based approach. Additionally, Templeman, Fredericks, Bunse, & Moses (1983) have pointed out that when designing an inservice training model: 1) initial instruction should take place at a demonstration site; 2) the training should be practicum based; and 3) follow-up should be provided at the participants' work setting. Caffarella (in press) has emphasized the necessity of adhering to basic principles of adult learning, as described earlier in this section, throughout the development and implementation of inservice training. It quickly becomes apparent to inservice trainers that training must be multi-faceted and must be approached systematically. Problems and issues related to inservice training are quickly compounded when the participants are interagency and interdisciplinary in make-up as they must be during transition and supported employment training. The guidelines below are strategies that the staff of Project TIE have found useful when designing and implementing interagency inservice training in the areas of transition and supported employment. These guidelines require a trainer to play a proactive role and to assume responsibility for active involvement in all phases of inservice planning, implementation, and follow-up.

Guidelines for Inservice Planning and Implementation

1) Develop a working knowledge of the organization(s) and community to be impacted by the inservice training.

2) Identify general objectives for inservice training based upon input from potential participants, agency and local decision makers, and your own values and knowledge base.

3) Establish conditions for the training which must be met by participating agencies and/or organizations.

4) Identify all participants and assure their participation throughout the inservice workshop.

5) Assess participants' training needs and their perceived learning objectives; set specific training objectives.

6) Design an inservice training format.

7) Establish evaluation procedures, both summative and formative.

8) Implement the training program and carry out the evaluation procedures.

9) Assure follow-up support and technical assistance.

10) Review evaluation results and determine a future course of action.

Guideline 1: Develop a working knowledge of the organization(s)' and community to be impacted by the insevice training

It is imperative for a trainer to develop a knowledge of the organization(s)' and community's current philosophy and practices regarding transition and employment for individuals with disabilities. This necessitates an identification of the major agencies and organizations operating within the community who play or can play a role in local transition and employment programs. Even if only one facility and its staff are targeted for inservice training, the trainer must recognize that this facility is impacted by and impacts upon numerous other agencies and organizations within the local community. Inservice training which changes services and consumer outcomes in the targeted facility will impact directly and indirectly on other local programs. An effective trainer must attempt to identify all systems which will be impacted by inservice training and as much as possible encourage their participation in the planned inservice workshop.

Once all systems have been identified, the trainer should attempt to identify a contact person within each system and make a telephone contact with that person. When long-term inservice is planned, and/or when fiscally or geographically feasible, the trainer should make a pre-training site visit to talk with decision makers and service providers and to actually observe local services. There are a variety of mechanisms for obtaining information about an organization and its surrounding locality prior to the development and provision of inservice training. A summary of the mechanisms Project TIE staff have used for gathering information about programs are summarized below.

Information Gathering Mechanisms for Inservice Training Planning

1) Cold calls to agency or organizations requesting name of person(s) coordinating secondary education services, transition services, supported employment services, and/or staff training services.

2) Calls to known professionals in other agencies or organizations to identify the agency liason or contact person for a specific service.

3) Telephone requests for written materials developed by the agency or organization related to the inservice topic (e.g., grant proposals, policy and procedures manuals, copies of local needs assessments, copies of consumer follow-up studies, implementation manuals for model programs, previous evaluation results, results of previous staff training efforts, agency staffing flowcharts, copies of state and local interagency agreements, etc.)

4) Site visits to meet targeted participants of inservice training and observe staff and consumer interactions.

5) Mailed copies of surveys or questionnaires to assess current service delivery patterns and consumer outcomes.

As much as possible, trainers should use a combination of the above mechanisms to obtain information. Although it may be very time consuming initially, whether information gathering is done through extensive reading, telephone contacts, site visits, and/or mailed requests for information, a thorough trainer can gather a great deal of preliminary information which will make workshop planning and implementation easier and ultimately more effective.

The questions outlined below summarize the types of information Project TIE staff have found useful for our trainers to explore prior to setting specific inservice objectives. Of course, the wording and specificity of the questions would depend upon the nature of the targeted agency or organization and elicited responses to previous questions.

Asking Questions About an Organization and Community Prior to Inservice Training

1) Do you feel consumers in your community have access to employment (vocational training, educational, etc.) opportunities that best match their abilities? Why or why not?

2) What are the most significant barriers to their accessing employment (vocational training, educational, etc.) opportunities?

3) What in your agency are you most proud of regarding transition (employment, vocational training, etc.) services?

4) What in your agency would you most like to see changed regarding transition (employment, vocational training, etc.) services?

5) Overall, are you and your agency satisfied with transition (employment, vocational training, etc.) planning services in your community?

6) How do you feel about interagency efforts related to transition and employment planning in you community?

7) What previous attempts has your agency made toward inservice training in the areas of transition and supported employment? Why or why haven't these efforts been successful?

8) What agencies and organizations would you like to see involved in the proposed inservice training?

9) What concerns would you like to see addressed in the proposed inservice training?

10) How many consumers were successfully placed in community-based vocational training sites (employment programs, etc.) by your agency last year? How does your agency define "successful"?

11) How many individual transition plans were written last year? What agencies participated? Do you think formal transition plans have changed targeted student outcomes? Why or why not?

Guideline 2: Identify General Objectives for the Inservice Training

Once a general knowledge of the target organization(s) and surrounding locality has been developed, the next guideline is for the trainer to identify general objectives for the inservice training. These general objectives will provide the trainer with a basis upon which decisions regarding specific training needs and objective can be established. With input from local decision makers and service providers gathered in guideline one above, the trainer should begin by defining what transition and supported employment currently mean to the local community. This definition should be firmly based on information gathered from mechanisms outlined in guideline one and not solely from the trainer's own values and perceptions. This definition may also be incorporated into an opening activity. Using this definition as a yardstick against which all community programs may be measured, the trainer may use the gathered information to

assess the current status of local organizations and agencies by:
1) identifying the targeted consumer outcomes of service provision; and
2) identifying the general staff training needed to accomplish the targeted outcomes.

Make a list of general staff training needs in broad inservice topics; for example, secondary vocational curricula, strategies for establishing community-based training sites, procedures for writing individual transition plans, procedures for evaluating the effectiveness of local transition planning, job development strategies, job site training strategies, writing local interagency agreements, etc. These general objectives for inservice training can be used to develop a pre-training needs assessment to be mailed to targeted participants as part of guideline five.

A general listing of inservice objectives will assist the trainer in identifying the attitudes, knowledge, skills, and policies which must be developed and/or changed in order to assure achievement of more specific training objectives and to assure ultimate changes in consumer outcomes.

Guideline 3: Establish Conditions for the Training which must be met by Participating Agencies and/or Organizations

Before any specific planning for inservice training can occur, the conditions for the training must be clearly delineated by the trainer and the sponsoring agency(ies) or organization(s). It is suggested that a written commitment between the trainer and sponsoring agency(ies) and/or organization(s) be developed. It is essential that all identified agencies and organizations impacted by transition and supported employment in the locality be involved in a workshop targeting these topics. For example, a workshop that will address guidelines for interagency transition planning in a community must include representation from the local schools, vocational rehabilitation, the local mental health/mental retardation agency, parents, and any other critical local agencies or organizations. A workshop that will provide specific supported work training to a group of newly hired "job coachs" would only need to target the newly hired staff. However, in many localities, a workshop of this type would only be possible after interagency training and planning efforts had taken place.

It should be stressed that all participants must agree to attend the entire workshop. Administrators and direct service providers from all participating agencies and organizations must be represented in equal numbers. Additionally, equal numbers of parents and adult consumer representatives should be asked to participate.

The trainer and sponsoring agency(ies) and/or organization(s) must also discuss who will assume responsibility for: 1) securing a training room; 2) furnishing refreshments; 3) copying handouts; 4) obtaining audio-visual equipment, 5) assuring follow-up; and 6) any fees and/or expenses required by the trainer. It is suggested that the trainer and the sponsoring agency(ies) and/or organization(s) develop a written contract to assure knowledge of all involved persons of the agreed upon responsibilities.

Guideline 4: Identify all Participants and Assure Their Participation Throughout the Workshop

If a trainer has carefully analyzed the organization(s) and community to be impacted by the workshop as suggested under guideline 1, and if he or she has clearly defined the conditions of inservice training which must be met by participating agencies and organizations, then the identification of specific participants should be easily accomplished by the trainer and the sponsoring agency(ies) and/or organization(s). The identification of specific participants should be the ultimate decision of the sponsors, but the trainer should guide them in the selection of participants who meet the agreed upon conditions. Whenever possible, it may be useful for the trainer to obtain a list of targeted participants' names and agencies prior to the first day of training. This, of course, is essential if a pre-training needs assessment, as discussed in guideline 5, is to be completed by each participant prior to training.

Guideline 5: Assess Participants' Training Needs and Their Perceived Learning Objectives; Set Specific Training Objectives

The key to effective inservice training is meeting the immediate needs of the participants. The training must be applicable to the current issues, values, and problem solving techniques that the targeted participants perceive to be important. Adults want to apply their learning to present situations and appear to be more motivated to learn when they are able to actively participate in the learning process (Caffarella, in press). When people feel they have participated in determining what will be discussed during a workshop, they will feel ownership and be more motivated to actively participate in the training and to utilize the new information in their work environments.

It is critical for the trainer to assess participants' needs prior to planning the specific training objectives, content, and activities for the training. This can be accomplished through mailed questionnaires, (based on the objectives gathered in guideline 2), formal telephone conversations and informal site visits with the participants. An effective trainer will be able to combine many of the strategies described in guidelines 1 and 2 to gather this information. Once the trainer feels that she or he has a good understanding of the organization, community, and participants' needs, she or he may begin to establish specific training objectives for the workshop.

Specific training objectives should be measurable through activities and content presented during the workshop. They should also be achievable during the time the trainer has allotted for training. An example of a training objective for transition planning is: "The participant will demonstrate the ability to write an individual transition plan." An example of a training objective for supported work training is: "The participant will give examples of activities completed by a job trainer during all phases of supported work." The specific training objectives selected by the inservice trainer will form the foundation for the development of the training format outlined in guideline 6.

While pre-training needs assessment are invaluable to trainers, the ability of the trainer to adjust, delete, and add material during the inservice workshop is critical. A good inservice trainer over prepares, but does not feel obligated to present all that she or he is prepared to discuss during the inservice workshop. Giving too much information, trying to "cram it all in", is as much of a mistake as being underprepared. The information should be available to the trainer in case she or he needs it. Participants' concerns and questions should trigger the trainer's use of additional information.

Guideline 6: Design and Inservice Training Format

The format for developing the attitudes, knowledge and skills of targeted participants typically ranges from a one to three day large group workshop to individual and small group technical assistance in the participants' place of employment (Renzaglia, 1986). In optimal cases, large group workshops may be followed by small group technical assistance visits at a later date. Based on an understanding of how and why adults learn, we feel that a combination of workshops and technical assistance is more effective in interagency transition and supported employment training (Houle, 1972; Knowles, 1980; Boyle, 1981; Caffarella, in press). Using the specific objectives the trainer and participants have identified as priority for the inservice training, an instructional format can be selected.

McDaniel et al. (1986) have identified four general phases to consider when designing inservice: awareness, knowledge, repatterning, and integration training. The first phase, awareness training, is spent reviewing the participants' feelings about current levels and types of service provision as well as changing roles they may play upon completion of the inservice training. This phase involves introducing (in an overview fashion) the participants to new philosophies and assisting them in determining the appropriateness of these methods to their specific situations (values clarification). This is an excellent opportunity for the trainer to use small group activities such as those described in sections V-VII.

Once the direction of the inservice has been established, the trainer may move the workshop into the knowledge phase. For example, specific techniques and knowledge concerning implementation of the transition process with supported work outcomes can be presented. The purpose of knowledge training is to provide participants with information and opportunities to understand the components of the transition process including techniques they may use in developing and implementing procedures within their own communities. For example, this phase of training should not attempt to teach participants everything there is to know about transition and supported work. Instead, this is an introduction to basic concepts, literature, research, techniques, and terminology.

After participants develop a knowledge of the transition and supported work process, they must be able to apply the new strategies and techniques to their professional activities. This is phase three, repatterning. New skills must be applied to "real world" settings and situations before participants can begin to incorporate the new skills and techniques into their repertoire. The use of field training sites, simulated activities, and role plays will enable participants to apply new knowledge, and techniques; feedback from the trainer regarding their use of new skills will enhance their competencies in the practical application of the material.

Once participants have demonstrated an understanding of the new knowledge and skills in applied settings, they are ready to fully integrate their skills into their repertoires. This is phase four, integration, where participants are encouraged to demonstrate competence in the use of new information within their daily professional lives. During this phase, the trainer must assure that participants are able to modify the new methods and techniques so that they fit their current professional situations. This phase of training must include systematic long term follow-along (technical assistance) in order to support the participants' on-going integration of new methodology (McDaniel et al., 1986) into their professional activities.

Using these training phases and the specific training objectives developed earlier, the trainer is ready to choose specific instructional techniques. It is important to remember that adult participants prefer receiving information in a variety of formats. Some participants will prefer formal lecture formats while other participants will prefer active hands-on learning situations. Knowles (1980) has categorized adult learners into three categories: 1) dependent; 2) collaborative; and 3) independent. The dependent learner is someone who has little or no information regarding the content when entering the inservice workshop. The collaborative learner is someone who has a working knowledge of the content and wishes to develop his or her skills further. The independent learner enters the inservice with a great deal of familiarity with the content and wants to move beyond specific skills training in order to discuss implications for use of the information within the context of his or her setting. A trainer should always assume that during any training session, particularly a large interagency session, there will be participants who are at each of these learner levels. Therefore, it is critical for a trainer to design a training format which will address learners at all three levels. The real test of an effective trainer is to assure that the the format selected reflects the learning modalities and presentation style preferences of all participants. What is the best format? Unfortunately, there is no easy answer; it ultimately depends upon the purpose of the training and the make-up and needs of the involved participants.

Knowles (1980) has suggested that trainers classify training techniques by their intended purpose: 1) Is the objective to change attitudes? 2) Is the objective to develop knowledge? 3) Is the objective to teach a skill? or 4) Is the objective to encourage creativity? The list below are strategies that project TIE staff have found effective in designing training related to transition and supported work. Specific examples of training materials are included in Sections V-VII.

Sample Inservice Training Techniques

Strategies for Attitude Development

1) Site visits: to observe discussed methods actually being used
2) Role plays: of typical situations followed by group discussion
3) Videotapes: or slides of discussed methods actually being used in a program
4) Structured team building activities: in which participants are actively involved and able to discuss their reactions
5) Group discussions: to facilitate face to face exchange of ideas and opinions
6) Activities: in which participants are involved and have to problem solve issues

Strategies for Developing Knowledge

1) Lecture: organized formal presentation of information and research

2) Anecdotes: specific examples and experiences of trainer

3) Audio-Visual Presentations: organized formal slide shows, slide-tapes, and video presentations of information

4) Demonstrations: modeling of procedures or process

5) Written Products: handouts and written training materials

Strategies for Teaching Specific Skills and Encouraging Creativity

1) Case Studies: Presentation of a situation for small groups to analyze and recommend plan of action

2) Structured Experiences: Participants participate in the utilization of procedures through exercises that replicate real situations

3) Field Experiences: Structured experiences in a real world situation under the supervision of an experienced trainer

4) Games: Facilitated by the trainer, participants share in activities that require application of particular skills.

5) Group Discussions: Small groups of 5-8 persons exchange ideas and discuss specific issues. (They may generate a list of questions, solutions to a problem, strategies for implementation of certain procedures within their community, etc)

6) Skits: Brief organized presentations of specific situations followed by group discussion

7) Role Playing: Involving participants in the utilization of specific techniques (prompts, data collection, employer contacts, etc.)

8) Working Pairs: 2 or 3 people discuss a specific topic for short periods of time (no more than 5 minutes to generate ideas regarding specific issues)

Guideline 7: Establish Evaluation Procedures, Both Formative and Summative

The major purpose of inservice evaluation is to ascertain what impact, if any, the training has had on the operations of the organization, the skills of the participants and the service outcomes to consumers in the organization. Weissman-Frisch, et al. (1980) have recommended a multi-perspective evaluation approach to inservice training programs. Generally, the successfulness of inservice depends upon whom you ask. Usually, inservice planners, instructors, participants, agency administrators, and service agency consumers have distinct perspectives regarding the training outcomes (Weissman-Frisch, et al., 1980). When evaluating training, the perspectives of everyone involved must be considered in the evaluation design. Five types of outcomes may be measured: 1) what the participants report; 2) knowledge gained; 3) how training is applied; 4) the effects on consumers; and 5) the effects on the organization (Ziarnik, Rudrud, & Bernstein, 1981). The trainer should attempt to assess each of these perspectives when evaluating the impact of his or her workshop. Examples of mechanisms for collecting these types of evaluation data are included in Appendix A at the end of this section.

1) What participants report (consumer satisfaction)

One component of evaluation is an assessment of the participants' satisfaction with the content and format of the inservice training. During a lengthy workshop, it is advisable to have participants complete evaluations periodically throughout the training rather than waiting until the end of the workshop to assess participant satisfaction. By having the participants complete evaluations of the individual training sessions periodically throughout the training, instructors and inservice planners have an opportunity to review the responses and make adjustments in the training content and format while the workshop is unfolding.

2) Knowledge gained (pretest/postest)

Another component of evaluation is an assessment of the knowledge or theory base held by the participants (Renzaglia, 1986). A written pretest taken by participants prior to any training establishes a measure of the participants' knowledge base upon which the inservice training is going to build. The post-test given at the conclusion of the training provides a measure of the participants' knowledge base after having participated in the inservice.

3) How training is applied (action plan)

Effective evaluation should also access the participants' application of knowledge in applied "hands on" settings. Participants who are involved in inservice training have participated in the workshop in order to learn new information or develop new skills to use in their jobs. An assessment of the participants' use of these skills should include an evaluation of their commitment to apply new skills in their jobs. One method of assessment is to have each participant or small group of interagency or locally connected participants develop a plan. The plan can delineate what the participant(s) agree to implement over the year following the initial training in order to demonstrate implementation of the new skills within their employment sites. The plan should clearly outline what the participants agree to do and how they will assess efforts to incorporate the new skills into their repertoires.

4) Effects on consumers (consumer outcomes)

The true goal of inservice training in transition and supported employment is to increase the quality of services provided by agencies to persons with disabilities. Thus, a critical component of an evaluation program is an assessment of changes in consumer outcomes. Inservice designed to improve consumers' outcomes might include the number of students placed in community-based training sites, the number of individual transition plans written, the number of consumers employed in work crews, enclaves, and supported competitive employment; the length of time employed; the type of residential living arrangements for consumers; wages earned; hours of intervention time required; etc. A pretraining post-training format will provide a measure of consumer outcomes, but should be one of the agreed upon conditions of training.

5) Effects on the organization(s) (systems change)

A final evaluation component is the assessment of the impact of the inservice training of staff on the operations of the organization(s) involved. For programs attempting to implement and improve the transition process from school to employment, a pretraining and posttraining survey on the level of interagency cooperation will give a picture of changes in the service delivery process. If this evaluation component is to be used, it should also be one of the pre-agreed upon conditions of training.

Guideline 8: Implement the Training Program and Carry Out the Evaluation Procedures

If the trainer has carefully and systematically worked through the pre-assessment and pre-planning strategies described in guidelines 1-7, implementation of the training program and evaluation procedures should go smoothly. Well, maybe "smoothly" is a little too optimistic, but the point is, pre-planning and pre-assessment will pay off during the inservice workshop. The list below summarizes key points for trainers to keep in mind during the workshop. More suggestions are provided in Section III, including use of audio-visual materials and room arrangements. The most important point for trainers to remember is to be yourself and enjoy the workshop!

Points to Remember During the Inservice Workshop

1) Before the workshop, arrange the room comfortably. (See Section III for more details).
2) During lengthy workshops, change speakers frequently and use a variety of audio-visual materials.
3) Change physical position in room frequently:
    a. Take brief breaks often, move around;
    b. Rearrange the room to correspond with needs of different presentations;
    c. Move to another room when the opportunity allows.
4) Minimize lecture, maximize participation:
    a. Get people to do something that's relevant and interesting to them;
    b. Ask questions and call on people;
    c. There are a few factual matters that have to be presented in lecture. For these, be a good public speaker, i.e., stand up, make eye contact with audience, don't say annoying things like "you know," "uh, okay?" etc. Be enthusiastic!

5) Give examples using experiences similar to those experienced by participants:
   a. Use demonstration with participants;
   b. Have participants try things and give encouragement and direction.
6) Make handouts from the overheads and slides when appropriate to save participants from having to take notes.
7) During small group activities, rotate between groups to assist them with the goal of the activity.
8) On each training day, arrive at the training room one-half hour before the start of training to insure that all materials, equipment, etc. are set up. Remember to try to make the room as comfortable as possible for the trainees and yourselves.
9) Be on time and start the workshop on time.
10) Check audio-visual equipment before the workshop begins. (See Section III for assistance).
11) Give at least 2 breaks each morning and afternoon.
12) Keep to the schedule, but be flexible enough to assure participation of trainees.
13) Delineate in advance how much time you want to give per issue.
14) Use anecdotes and examples frequently.
15) Allow time for questions.
16) Personalize the training by referring to the audience's background and needs.
17) Stress development, i.e., each of us is learning what to do. Much of the field is trial and error. Build on each other's experiences.
18) Socializing is very important; talk to trainees during breaks!

For each inservice workshop a trainer coordinates, it is useful to develop and utilize a working calendar that delineates all the activities and timelines necessary for implementing and following up the inservice. This calendar should clearly outline staff assignments and specific roles. A calendar is particularly critical if many staff are involved in several types of workshops throughout the year with numerous organizations or agencies. Even if a single trainer is involved in only one or two workshops, a calendar becomes critical in meeting all agreed upon responsibilities and timelines.

Guideline 9: Assure Follow-up Support and Technical Assistance

A component which should be built into inservice training is the development of follow-up support/technical assistance. Follow-up support and technical assistance will be more effective if the inservice participants are actively involved in the development and implementation of the plan. Upon completion of the inservice workshop, the first step in developing a follow-up support/technical assistance plan is to prioritize the goals with inservice participants. Project TIE staff have found the utilization of an activity, similar to the one below, helpful in stimulating discussion regarding the identification of objectives for teams to work on during the next one year period.

Action Plans for Local Interagency Planning Teams

As an interagency team, first identify and then prioritize the issues you would like to see addressed by your local interagency planning team.

Step 1: Is This a Need		Step 2: Is This a Priority?
___yes ___no	1. Purpose or mission statement of team's action plan	_____
___yes ___no	2. Process of eligibility determination for each participating agency's services	_____
___yes ___no	3. Referral procedures of each agency's services	_____
___yes ___no	4. Staff allocation for transition planning/supported employment services	_____
___yes ___no	5. Procedures for implementation of local action plan	_____
___yes ___no	6. Plan for dissemination of local action plan	_____
___yes ___no	7. Plans for crossagency inservice staff training	_____
___yes ___no	8. Menu of service options currently available locally	_____
___yes ___no	9. Identification of new services targeted for development	_____
___yes ___no	10. Procedures for development of new services	_____
___yes ___no	11. Specification of target population for pilot services	_____
___yes ___no	12. Delineation of time-limited and on-going services available from each agency	_____
___yes ___no	13. Cost/sharing/funding coalitions planned or currently in place	_____

Step 1: Is This a Need			Step 2: Is This a Priority?
___yes ___no	14.	Data sharing provisions	_____
___yes ___no	15.	Release of information and confidentiality	_____
___yes ___no	16.	Roles/attendance of personnel IEP/ITP meetings	_____
___yes ___no	17.	Timelines for implementation of agreement objectives	_____
___yes ___no	18.	Schedule/procedures for renegotiation or modification of agreement terms	_____
___yes ___no	19.	Policies on specific service delivery related to transition planning/supported employment	_____
___yes ___no	20.	Identification of agency liaisons in participating agencies	_____
___yes ___no	21.		_____
___yes ___no	22.		_____

Project Transition Into Employment

LOCAL ACTION PLAN

Locality:________________________ Development Date:________________

Team Members:________________ ________________ ________

________________ ________________ ________

Objectives	Activities	Timelines

The trainer should provide ample time for team members to discuss the suggested issues on the planning sheet above and to add any additional points the team(s) deem necessary. Each member of the team should individually determine which issues they feel are of priority and rank order these as their top five priorities.

Once each individual member has completed this process, the trainer should assist teams with determining priorities by implementing the following procedure:

1) For each item listed, request each member to identify the rank (1st, 2nd, 3rd, 4th or 5th), if any, they gave the item.

2) Proceed through all items

3) Total scores and rank order the items from highest to lowest priority, based on the group's data.

4) From the prioritized list the team member should identify the objectives they plan to work on during the next year.

5) Write the objectives, activities, and timeline on the local action plan.

Once objectives for the following year have been identified, the group should outline activities for obtaining the identified objectives and identify follow-up/technical assistance which will be requested from the trainer in words that assure team members can successfully address the objectives.

Follow-up/technical assistance can and will take many forms depending upon the target objectives of the team(s). The following table illustrates a support/technical assistance matrix which trainers and participants may use to assure completion of the initial inservice plan and on-going assessment and provision of training.

Follow Up Support/Technical Assistance Planning Matrix

Training Objective	Training Mechanism(s)	Training Materials	Evaluation Mechanism

Guideline 10: Review Evaluation Results and Determine a Future Course of Action

The organization implementing the inservice plan should compile an annual report which lists all the objectives identified in the follow-up support/technical assistance plan. The annual report should list each objective and describe each activity implemented to address the objectives. Documentation should be provided which clearly indicates the degree to which each objective was meet. An example of an annual report used by Project TIE is included on the next page.

The annual report provides a forum through which the trainer should facilitate the local team members to critically review the results of their inservice activities for the past year. Through careful review of the degree to which each objective was accomplished, the local team members can identify future staff development needs, outline specific objectives, design and implement training, and evaluate the effectiveness of the training. Professional growth is an ongoing process and the review of the annual report guides the local team members by providing an opportunity for the continued design and implementation of inservice training that is functional.

ANNUAL REPORT

Locality:

Agencies Involved in Local Planning Team:

1) If a needs assessment was conducted on a state level or within individual localities, please attach a copy of the summary.

    a) Number of persons with moderate and severe disabilities currently involved in community-based vocational training in schools at the local level:

    b) Number of persons with moderate and severe disabilities currently involved in interagency transition planning in schools in each locality:

2. Training and technical assistance provided to locality:

    a) Local agencies involved in each locality:

    b) Dates and nature of training and technical assistance at local level:

3. Explain changes in each locality which have taken place since the training and technical assistance has been provided by the planning team (i.e., establishment of an individualized transition plan process, development of supported work options, establishment of community-based vocational training in schools, transition plans written, and number of persons involved in supported work options.

4) Explain efforts in parent involvement, including parent training on transition from school to employment, on the local level.

5) Explain public awareness efforts at the local level, such as workshops, public service announcements, and presentations to civic or parent organizations.

Names of person(s) completing this form:

Date of form completion:

References and Resources for Inservice Training in Human Services Agencies and Organizations

The following references and resources may be useful to staff trainers in increasing their knowledge of inservice training. Several of the resources listed below also contain sample training materials and activities which may be combined with the sample training activities in this manual and adapted to the needs of individual trainers and their targeted participants.

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Appendix A

Evaluation Mechanisms

Date______________________________

Site______________________________

PARTICIPANT EVALUATION FORM

DIRECTIONS: Please circle the number that best describes your reaction to each of the items listed below. Your input and evaluation will be used to improve this training as well as to plan future training of this type. Thank you.

1. The objectives of this training were:	Clearly Evident 1	2	3	4	Vague 5
2. The organization of this training was:	Excellent 1	2	3	4	Poor 5
3. The presentations and quality of materials was:	Excellent 1	2	3	4	Poor 5
4. The ideas and activities presented were:	Very Interesting 1	2	3	4	Poor 5
5. Overall, I found this training to have been:	Excellent 1	2	3	4	Poor 5

6. Which topic or presentation was the most helpful to you?

7. Which topic or presentation was the least helpful to you?

8. What topics/information would you like to see addressed in future follow-up training?

9. The program could have been improved by:

10. Other Comments:

Project TIE Training Course

Post test

Social Security #:________________________

Agency/Organization:________________________

State:________________________

Date:________________________

1. List 4 key elements of vocational transition as described in current definitions.

2. List 4 factors that affect the functioning of interdisciplinary teams.

3. What 2 current pieces of legislation designate the school as the major agency responsible for transition from school to work for persons with disabilities?

4. List 2 characteristics of appropriate vocational training at the middle and secondary levels for students with severe disabilities.

5. List the 4 components of the supported work model of competitive employment.

6. List 2 reasons secondary school programs should conduct follow-up studies of graduates with severe disabilities.

7. List 4 crucial members of an individual transition team.

8. Describe the purpose and goals of local core transition teams.

Project TIE Questionnaire

Directions: Please complete the following questions and return this form to:

Project TIE
RRTC-VCU
1314 W. Main Street
Richmond, VA 23284-0001

Code number of person completing questionnaire (please use social security number as code number):____

Agency represented:____

State represented:____

Please indicate your level of participation with Project TIE (check all that apply):

_____ received initial information letter or brochure from Project TIE
_____ discussed project with Project TIE staff over telephone
_____ met in person with Project TIE staff
_____ identified an agency representative to participate in Project TIE training course
_____ attended or plan to attend Project TIE training course myself

---

1. Does your agency have current interagency agreements related to providing services to persons with disabilities with other agencies on:

    a) State level (circle one) Yes No Agreements are being negotiated

    b) Local level (circle one) Yes No Agreements are being negotiated

2. If yes to 1(b), are the agreements optional or required? (circle one)

    Optional Required

3. If yes to 1(a) and (b), does the agreement identify specific responsibilities for your agency on:

    a) State level (circle one) Yes--minor responsibilities Yes--major responsibilities No

    b) Local level (circle one) Yes--minor responsibilities Yes--major responsibilities No

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4. What other agencies are parties to the agreements? (list)

Local	State

5. If yes to 3(a) and (b), please list two or three major responsibilities on the state level (list)

State level responsibilities:

...on the local level (list)

Local level responsibilities:

6. Does your agency have an individual identified for vocational transition related services? (circle one)

Yes--as sole responsibility   Yes--as one of many responsibilities   No

7. If yes to question 6, please list the major responsibilities of that person. (list)

8. In what ways does your agency cooperate with other agencies in planning and implementing transition related services?

a) to other agencies (fill in spaces)

	State level	Local level
Type of service		
Frequency of service		
What agencies receive service		
Number of agencies		

b) to clients (fill in spaces)

	State level	Local level
Type of service		
Frequency of service		
Targeted population		
Number of individuals		

c) to individual service providers (fill in spaces)

	State level	Local level
Type of service		
Frequency of service		
Targeted population		
Number of individuals		

9. In your opinion, is amount of cooperation at the:

a) State level (circle one)

1	2	3	4	5	6
Too low					Too high

b) Local level (circle one)

1	2	3	4	5	6
Too low					Too high

10. If you feel cooperation is too low or too high, what cooperative action would be taking place if cooperation were at the right level at the:

a) State level (fill in blanks)

____

____

b) Local level (fill in blanks)

____

____

11. In your opinion, what group(s) of clients is your program primarily aimed at serving? (check all that apply)

_____ mild mental retardation
_____ moderate mental retardation
_____ severe mental retardation
_____ profound mental retardation
_____ dually diagnosed (mentally retarded/mentally ill)
_____ developmental physical injury
_____ alcohol/drug abusers
_____ multihandicapped (please describe) ____________________
____

_____ hearing impaired
_____ deaf
_____ visually impaired
_____ blind
_____ deaf/blind
_____ autistic
_____ traumatic physical injury
_____ mentally ill/emotionally disturbed
_____ other (please describe)
____

In statements 12-15, please circle the most appropriate letter for each statement using the following code:

SA	A	U	D	SD
Strongly Agree	Agree	Undecided	Disagree	Strongly Disagree

12. Assuming jobs are available, most adults with severe disabilities can hold a job with a competitive wage with or without support. (circle one)

SA A U D SD

13. Most adults with severe disabilities can hold a job with a competitive wage only with ongoing support. (circle one)

SA A U D SD

14. Cooperative transition services between my agency and other agencies will help to reduce the unemployment rate among severely disabled individuals in my state. (circle one)

SA A U D SD

15. Transition services coordinated between my agency and other state agencies will help to reduce duplication of services and/or gaps in my state. (circle one)

SA A U D SD

Local Service Delivery Outcomes Questionnaire

Directions: Please complete these items: Staff Development, Community Based Vocational Training, Interagency Transition Planning, and Paid Employment Placement based on your activities over the past nine months. Please complete all items. *Note: Please use additional sheets if necessary.

STAFF DEVELOPMENT*

Directions: List any presentations, workshops, seminars, etc. (on community-based instruction, transition, and/or supported employment) that you have sponsored. Copies of agendas may be included.

	Topic of Staff Development	Date(s)	# Inhouse Staff Trained	# Parents Trained	# Employers Trained	# Staff Outside Your Agency Trained
Example	2 Day Workshop	6/19-6/20	9	3	--	--

COMMUNITY BASED VOCATIONAL TRAINING*

Directions: List any community based vocational training that LEA has conducted in the previous nine months.

	Type of Training Site	Total # Students Trained At Site	# Students/Clients Paid (Unsubsidized, i.e., min. wage or higher)	# Students/ Clients Paid (Subsidized, i.e. OJT, etc.)	# Student Clients Unpaid	Staff to Client Ratio	# Staff Hrs./Site/ Day	# Student/ Client Hrs./Day On Site	Avg. Time on Site/ Student
Example	Kit. Utility	8	5	2	1	1:1	4 hrs.	4 hrs.	9 wks.

PAID EMPLOYMENT PLACEMENT*

Directions: List each student you or your agency have/has placed into competitive employment in the previous nine months.

	Student/ Client Placed	Date Hired	IQ Label	Type of Job	Hours Worked per Week	Total Staff Hrs. Onsite for Training	Wages Earned/ hr.	Wages are Unsubsidized?	Age of Student Client	Is this Person Still Employed?	Have Contacted This Person in the Past 2-4 Weeks
Example	Client A	9/18	35	Pot Scrubber	20	98	3.45/hr.	Yes	19	Yes	Yes

During the Previous Nine Months:

# of students/clients place in jobs____________________

# of students/clients losing jobs____________________

# of jobs refilled after loss____________________

# of clients replaced after losing their first job____________________

# of clients who received community-based employment training prior to placement____________________

Does your LEA have a formal local written interagency agreement targeting transition planning and/or supported employment planning? Yes No

If yes, please list the agencies involved:____________________

Please attach a copy of the agreement.

INTERAGENCY TRANSITION PLANNING*

Directions: List any transition meetings held by your LEA during the previous nine months. Sample transition plans may be attached.

	Number of Transition Meetings Held	Number of Agencies Involved (identify each agency participating)	Disability Type/ Level of Students Targeted	Age of Student Targeted	Format of Plan
Example	6	2 (school, MR agency)	TMR-SPH	18-21	addenda to IEP

Section II

Building Teams Among Agencies and Disciplines

By

Howard Garner

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Building Teams Among Agencies and Disciplines

Interdisciplinary teamwork among professionals from several agencies is required in order to achieve successful transition from school to work for students with handicaps. The disciplines that are most often involved in this process are special education, vocational education, vocational rehabilitation counseling, developmental disabilities, social work, psychology, public administration, and occupational and physical therapy. Professionals from these various disciplines are usually employed by departments of mental health and mental retardation, rehabilitative services, social services, and the public schools. Each of these disciplines and public agencies has expertise to contribute and a vital role to play in working with the student and his or her family in the move from school to the world of work. However, the ability of these disciplines and agencies to bring their unique contributions to the transition planning process is dependent upon the achievement of teamwork.

The Ten C's of Teamwork

Teamwork is more than a philosophy: it is an event. During transition planning, teamwork either occurs or it does not. Team members' belief in it is not enough; it has to be put into practice in order to make a difference in transition outcomes for young adults. As seen in the world of sports, a team does not automatically experience teamwork just because it has the name. Teamwork occurs as the result of training, practice, and hard work. In the helping professions, teamwork includes a number of specific professional behaviors that are discussed here as the Ten C's of Teamwork. These characteristics of teams are especially critical during transition planning and supported work services implementation because

Building Teams Among Agencies and Disciplines

Table 1

The Ten C's of Teamwork

1.1 Communication
1.2 Cooperation
1.3 Collaboration
1.4 Confronting Problems
1.5 Compromise
1.6 Consensus
1.7 Coordination
1.8 Consistency
1.9 Caring
1.10 Commitment

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these are human services concepts that would be impossible to implement without interagency and interdisciplinary team planning.

Communication is the first *C* of interagency and interdisciplinary teambuilding. Everyone knows that communication is essential in all human organizations. The statement, "I think we have a communication problem here," is frequently heard when problems emerge among people working together. Teamwork includes communication because all members of the team must be willing to share their information, their ideas, and their points of view with all other members of the team. Communication requires skills in both sharing and receiving. Teams work hard to insure that all team members have the information they need to do their jobs. During transition planning, communication necessitates not only official release of information from the public schools to adult service agencies, but also informal communication among classroom teachers and vocational rehabilitation counselors, case managers, parents, and the targeted student.

Cooperation is the second *C* of interdisciplinary and interagency teamwork. The word cooperate means "to operate together." When team members are cooperating, they look for ways of supporting and complementing the contributions of others. *Coordination* is another essential component of a functioning team. For as we work together, we order our contributions in such a way as to maximize the effectiveness of each other's work. During supported work implementation this often means sharing responsibility for major goals like job placement and follow-along services rather than claiming, "That's not my job!".

Closely related to cooperation and coordination is the team concept of collaboration. Again the prefix co- provides the meaning of "together." Collaboration means laboring together. When we say "we collaborated on a project with someone else," we mean we actually worked side by side in completing the task. In interdisciplinary and interagency teams, professionals sometimes work independently and coordinate their respective activities and at other times work side by side. In both situations, communication and cooperation provide the foundation. The result in either case is consistency and reduced duplication of services since all team members share common goals and a plan of action allowing them to work effectively both alone and together.

The team's plan of action is achieved through a process of confronting problems, compromising, and consensus decision making. The members of effective teams recognize that problem identification and problem solving are fundamental responsibilities of the helping professions and a critical initial step of transition planning. Thus, transition team members must be willing to express their concerns regarding employment and residential services problems and to engage in a democratic process of discussion, compromise, and consensus decision making to determine the most effective transition plan for an individual student and his or her family. Admittedly, this process is frequently time consuming, but the plan that is developed at the end is a plan which all team members are more likely to support and enthusiastically implement.

The last two of the Ten C's of Teamwork are caring and commitment. These are listed last because they often emerge from the interactions that occur among the team members as they work together to develop agreed upon transition plans. Of course, helping professionals care and feel commitment before they become members of interdisciplinary and interagency teams. If they did not, they would probably not have chosen a career in serving other people. However, teamwork produces new levels of caring and commitment not only to one's clients, but also to one's team members. In the process of working closely with other professionals to develop a plan for services which reflects shared values and goals, teams are often able to experience a depth of professional relationship that is extremely satisfying and meaningful. Team commitment to the concept of supported work for all local consumers who need such services is an example of this type of commitment.

The Ten C's of Teamwork can remain just a bunch of words or they can be realities that provide the foundation for teamwork together. The frustrating thing about these characteristics of teamwork is the fact that everyone believes in them! We all agree teamwork is absolutely essential, but unfortunately, too often it does not occur because of a number of significant organizational, professional, and psychological barriers.

Organizational Barriers to Teamwork

Helping professionals, like other people, are very much affected by the structure of the organizations or agencies in which they work. Each agency and organization is designed to promote certain values and to achieve specified goals. The individual professional takes his or her cue regarding appropriate professional behavior from this organizational structure and value system as well as from those who are in positions of power in the organization.

Agencies that are organized to achieve teamwork would be expected to assign professionals to teams, thereby indicating their belief in the importance of collaboration and cooperation in the exercise of one's job responsibilities. However, most agencies do not organize professionals into teams, but instead into departments. It is in departments that helping professionals receive their cues to compete--not to cooperate. It is in departments that the major barriers to interdisciplinary and interagency teamwork are encountered.

Professionals are assigned to departments based on their training, titles, and expected roles. Social workers are assigned to the social services department, psychologists to mental health, teachers to education, and rehabilitation counselors to rehabilitative services. Supervision of these employees is provided by a department head who also has training in the particular discipline. The offices of each department are usually separated from the other departments resulting in a restriction in the informal interaction with professionals from other disciplines. As we would expect, each department becomes rather self-contained, and the professionals who work together naturally develop strong loyalties to each other, to their department, and even to their supervisor.

Each department develops its own philosophy of service delivery and its own priorities as well as its own strategies for achieving its goals. In so doing, each department formulates an action agenda that requires specific resources and personnel. Since financial resources in nearly every agency for human services are usually limited, the various departments and agencies are forced to compete with other departments and agencies for the means to achieve their respective goals. Helping professionals who are committed to helping others thus find themselves competing with one another for influence, power, control, resources, and

Building Teams Among Agencies and Disciplines

Table 2

Organizational Barriers to Interdisciplinary and Interagency Teamwork

2.1 Departmentalizing of professionals into units based on training, title, and role.

2.2 Supervision and evaluation of employees by department heads.

2.3 Loyalty to one's professional unit, boss, and colleagues.

2.4 Physical separation of work areas and offices.

2.5 Competition among departments for resources, influence, power, and status.

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status. Even though an individual professional does not have responsibility for promoting the interests of his or her own department in this political arena, the effects of this competition appear to be inevitable. In a departmentalized work environment, teamwork becomes a secondary agenda that everyone advocates in principle, but few actually put into practice.

Professional Barriers to Teamwork

In addition to these organizational barriers to teamwork, the members of interdisciplinary and interagency teams frequently encounter a number of professional barriers to teamwork.

As teams begin to meet, the members discover they are separated by the specialized educational preparation of the various team members. Each professional brings a particular point of view that was learned in a specialized university training program, through inservice training experiences, and through job experiences. As the helping disciplines have become more specialized, each has developed its own set of professional terms and jargon that makes communication with other disciplines more difficult.

A second professional barrier encountered by interdisciplinary teams is the problem of role ambiguity and incongruent expectations. Each professional has a clear idea of his or her own role on the team. However, few understand the skills and competencies possessed by the other team members. What does a rehabilitation counselor do that is different from a vocational teacher? What does a social worker do that is different from a case manager in the area of services to families? It becomes obvious to teams that roles often overlap quite a bit, and that we are not very well

Table 3

Professional Barriers Separating the Members of Interdisciplinary and Interagency Teams

3.1 Educational preparation resulting in specialized points of view, ideologies, values, and jargon

3.2 Role ambiguity, and incongruent expectations

3.3 "Status differentials"

3.4 Authority and power structures

3.5 Leadership styles

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educated regarding the specialized contributions of other disciplines and agencies. We are then faced with incongruent expectations regarding what we think we should be doing and what others expect us to do. This ambiguous situation is confusing to all members of the team and can become a serious barrier to communication and team functioning.

A third barrier can best be termed "status differentials." In spite of our commitment to humanistic values and to the importance of helping others, we are still affected by our perception of our own profession's status as well as that of other disciplines. Think about the following list of helping professions and see if you perceive any status differences among them: nursing, physical therapy, psychiatry, rehabilitation counseling, social work, and special education. If you had to rank these five disciplines according to the status they have, could you do it? Of course you could! You might quibble about whose criteria you should apply--society's or the client's or your own, but the point is, we all have perceptions of status.

Even if we don't think status is very important and believe we should respect each other as equal professionals, we respond defensively if we find ourselves and our particular discipline being discriminated against or criticized by others. It is okay for a vocational education teacher to describe the problems with secondary vocational training programs, but how dare a rehabilitation counselor do so! We all want to receive respect from others, and we react negatively when we do not receive it. This need for respect and for status within a team can become a significant barrier to the team members trusting one another and therefore in their communicating and cooperating with one another.

Closely related to the issue of status differentials are the effects of authority and power structures. In some teams, a leader is designated and appointed by the organization or agency. In some schools, special education teachers are expected to serve as the leader of the transition team. In some employment programs, rehabilitation counselors may be delegated similar responsibilities. The designated leader may assume the power to set the agenda and to make certain decisions for the team. In other organizations, the leadership of the team is rotated among the team's members with the recognition that shared leadership results in an increase in a sense of ownership and responsibility by all team members. Authority and power structures of the organization will affect the team's functioning. The centralization of power in one team member can become a barrier to all team members feeling equally invested in the goals of the team. This may be particularly obvious when parents or adults with disabilities are included as team members without an agency or organization identification.

The last professional barrier to teamwork to be discussed in this section is leadership styles. Everyone who assumes a leadership position has an individual style of leading. Some leaders are more democratic than others; some are more authoritarian. Other leaders value the use of group process in making a decision while others are impatient with extended discussion and prefer to cover a large number of issues rather quickly. Teamwork depends on the use of a problem solving process that encourages total participation. This means all team members need to share information and their respective points of view and work toward consensus decisions that everyone on the team can support. Team leaders who tend toward more authoritarian and directive styles of leadership may be perceived as presenting a barrier to the team doing its job. Teams need their various members to exhibit leadership that promotes effective team functioning.

Behaviors That Impede Interdisciplinary and Interagency Teamwork

The final list of barriers to teamwork includes the behaviors of the members of an interdisciplinary team that impede the team's work. The first problematic behavior is competition. Team members sometimes compete with one another for influence, status, control, power, and resources. You may have noticed that these are the very same things that departments seek in their competition with each other. Of course, an individual may have high needs for these indicators of significance or may compete for them because his or her department expects its members to pursue them in defense of the collective turf. It is important to acknowledge that everyone has a need to feel important and to be significant in his or her work. The goal of teamwork is not to block the fulfillment of this need but to create an environment where all team members may make their greatest contributions by working together and supporting one another.

A second behavior that impedes teamwork is the failure to share information. It has been said that knowledge is power. In teamwork this is certainly true. When the team has information regarding the clients it serves and the issues it faces, the team is empowered to act. When the team lacks full information, it cannot function and remains weak. In fact, it will make many mistakes and encounter much failure and frustration. Unfortunately, some members of teams use their information as power for themselves instead of for the team. They carefully guard what they know.

Table 4

Behaviors That Impede Interdisciplinary and Interagency Teamwork

4.1 Competition among individuals for influence, status, control, power, and resources

4.2 The failure to share information, especially regarding the needs, progress, and ecology of each client

4.3 An absence of planning and coordination of professional interventions and services

4.4 Inconsistency as each individual and discipline applies its own strategies based on its perception of the client's needs

4.5 Interpersonal conflicts (hurt feelings, jealousies, misunderstandings) that are not talked out and resolved

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They do not share their assessments and training data with other team members. They may tell their team members only what they think their team members need to know. This clearly impedes the team's functioning and leads to long and irrelevant discussions that could be avoided if all members of the team openly share their information, their ideas, and their perspectives.

The third behavior that keeps interdisciplinary and interagency teams from achieving their full potential is an *absence of planning and coordination*. A team allows all of its members to contribute their skills and expertise in pursuit of common goals. This is best achieved when the activities of all team members are carefully planned and coordinated. This allows the efforts of the individual team members to complement those of the others. Individual strategies and interventions in solving problems can be sequenced so that the work of one team member builds on that of her or his colleagues.

Unfortunately, in many organizations the left hand does not always know what the right hand is doing. This can also occur within a team, and when it does, the absence of planning and coordination prevents the team from achieving its goals. This problem occurs when individual team members make decisions about what is needed and what should be done without consulting with others who are concerned about the same problem. Since most of us are not experienced members of highly functioning teams, we can very easily make this mistake. We are used to operating independently and without the support of others--especially others from different departments and different disciplines. Transition planning of this type may result in duplicate referrals, duplicate assessments, or placements without support services.

A closely related barrier to teamwork is the problem of inconsistency. This barrier most often is encountered when each team member develops strategies based on his or her particular view of the problem and unilaterally implements a course of action to solve it. If the interdisciplinary or interagency team is delivering direct services to a client, the lack of a consistent plan of implementation will probably result in ineffective transition services, confusion, and frustration on the part of all concerned. Inconsistency on the part of the individual team members will decrease the power of each of the strategies being employed. Finally, inconsistency leads to conflict as the team members become frustrated with one another. When this happens, we can personalize the problem and direct criticism at those who are blocking our well-intentioned efforts.

This leads to the final behavior that impedes interdisciplinary and interagency teamwork--interpersonal conflicts that are not talked out and resolved. When human beings work together in small groups, conflict is inevitable. If we can accept this fact, we will recognize the need to find effective ways of resolving conflicts within a team as they arise. It is interesting that many people in the helping professions are not very good at dealing with interpersonal conflict. If given the choice, would you prefer to avoid conflict, engage in conflict, or resolve conflict? A lot of us would choose to avoid conflict at all costs! This choice indicates the belief that conflict can really be avoided. If we are committed to avoiding it, we develop this skill and fail to learn how to resolve the conflicts that we inevitably face in our work.

Conflict comes in many forms. Some are very professional such as a difference in employment values. Some are more personal such as feelings of being left out or of being unappreciated. Other conflicts are a result of misunderstandings in which two people do not hear each other accurately and may believe they are in disagreement when in reality they are not. Other conflicts result from the need for public recognition for our work and feelings of jealousy when others receive what we think we deserve. Teams have great potential to resolve these conflicts; however, when issues such as these occur within a team and they are not resolved, they will become significant barriers to the teams ability to function.

Five Essentials for Teamwork

Teamwork is based on five essentials including organizational structure, administrative leadership, shared values, interpersonal relationships, and teamwork skills. Some teams attempt to function with only one or two of the essential ingredients and then become frustrated and cynical when the promised benefits are not received. The following section describes the interrelationship of these five factors and provides suggestions and resources for creating the conditions in which teamwork can be achieved during transition planning.

Organizational Structure

In the earlier discussion regarding organizational barriers to teamwork, the negative effects of the departmental model of program organization were mentioned. Human beings are territorial animals and will always defend their turf against intruders and competitors. The organizations within which we work define for us the territories we will

Table 5

Five Essentials of Teamwork

5.1 Organizational structure

5.2 Administrative leadership

5.3 Shared values

5.4 Interpersonal relationships

5.5 Teamwork skills

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defend and promote. If we are assigned to departments, we will defend departments. If we are assigned to teams, we will defend teams. Thus, if the goal of an organization is to achieve effective delivery of interdisciplinary and interagency services, it makes sense to organize the professionals into teams.

Many large companies have long since discovered the power of people working together in small groups in pursuit of common goals. The administrators of the helping professions, who are supposedly specialists in human behavior, have not been as willing to employ teams in their organizations as a means of solving agency and organizational problems. Instead, we have continued to organize our various specialists into departments and then send them to what we call "team meetings" that are, in reality, the battleground for departmental wars.

Many helping organizations have the ability to re-organize themselves into teams, but fail to do so because of the entrenched power base of the departments. This is true in both large and small agencies and organizations. State governments are perhaps the best example of the departmental model refusing to yield to more modern management structures. Of course, the excuse given there is that the state government is only emulating the model of the federal funding agencies. In spite of this, some states have restructured their helping agencies to achieve better coordination of the diverse services being provided their citizens.

Even those states that have not reorganized into teams have frequently recognized the need to form interagency transition planning committees in an effort to avoid duplication of services and minimize the seemingly inevitable conflicts over money and personnel. Some of these interagency committees may even refer to themselves as "teams." And in some situations, these committees are able to achieve some aspects of teamwork in spite of the organizational structure. When this occurs, the other essentials for teamwork are usually in abundant supply.

Teams function best when the members of the team do not have divided loyalties. Whenever possible, teams of professionals should be formed around intact groups of clients. It is preferable for team members to have membership in only one team. It is also preferable for team members not to have departmental loyalties.

The membership of a team needs to be clearly defined. In the early stages of the team's development the membership needs to be stable and predictable. The organization needs to identify the members of each team so that the team can develop a sense of its own identity and goals. A functioning team is not like a committee where those who are absent may send a substitute.

If an interagency team is formed, its members should be official representatives of their respective agencies whenever possible. This means that the executive officers of the participating agency should appoint them and define the parameters in which they can operate. This will allow the members of the interagency team to know how far they can go in the pursuit of real teamwork.

Administrative Leadership

Administrators need to be good models of teamwork for their employees to follow. They need to practice the "ten C's of teamwork" in their daily interactions with others. They also need to be sensitive to those decisions that are best made by teams and those that require administrative input and guidance. The interactions between teams and the team's administrator are crucial to the success of the team.

In the case of an interagency team, the messages given to the team members by their respective supervisors are also critical. Helping professionals are very responsive to the signals given them by their superiors. If an administrator advocates teamwork in philosophy, but does not practice it, his or her employees will do the same. If an administrator assigns a staff person to an interagency team, but does not give clear directions to participate fully and to cooperate, the person may assume his or her role in the team is to participate as a departmental representative and to compete in defense of the department's interests. In other words, mere membership on an interagency team does not necessarily give permission to become involved in the kind of open communicating or consensus decision making discussed throughout this section.

Many administrators of state and local agencies providing human services need inservice training on how to promote and support the functioning of interdisciplinary teams. Their past experiences have schooled them in the ways of interagency politics and competition. Hopefully, their experiences with interdepartmental fighting will help them to see the urgent need for real cooperation and communication among the various disciplines and administrative units. As interagency teamwork becomes a desired goal and in some cases a requirement, the administrators will need to know how to promote, facilitate, and bring it about. Without them, one of the five essentials for teamwork will be missing.

Shared Values

Team members need to share certain basic values in order for the team to succeed. The first, and perhaps the most important value, is that "we are here to serve our consumers." When teams are able to put the needs of those they serve first, they have a guiding principle to use in making decisions. This is one of those values that is easy to advocate but not always easy to practice. When teams make decisions, they can be swayed by self interest, politics, and territorial issues. If we are working together as a team because we want to design and implement the most effective programs possible for the consumers we serve, then we will be standing on common ground. As we make decisions to place people in jobs, or plan recreation facilities, we must ask ourselves, "How will this decision affect the consumers we serve?" Many professionals in the field have made teams work because they shared this value and were willing to make sacrifices to realize it.

Another basic value that effective team members share is, "We will make better decisions and be more effective by working together." Most helping professionals have been trained to serve their consumers in a one-to-one relationship. We have been trained to gather information and to assess what services or training our consumers need. We have been trained to provide education, training, and support to our consumers in a sequenced and systematic manner. Few have received training in combining our knowledge and expertise with that of other professionals in order to make better decisions and to provide more effective services. However, experience has shown us the limitations of this first approach. The problems that our consumers face related to transition and supported employment services are unfortunately bigger and more complex than any one discipline can resolve alone. Even if we prefer working independently, the realities of our consumers' needs have taught us, we must work together. Those of us who have done so in teams now subscribe to the value that none of us is as smart, competent, or effective as all of us working together.

Interpersonal Relationships

Teamwork among helping professionals needs to be based on positive interpersonal relationships among the members of the team. Positive relationships depend on trust, openness, acceptance, caring, and commitment. It goes without saying that strong interpersonal relationships have to be built over time. Thus, when a new interdisciplinary or interagency team is formed, one should not expect that strong interpersonal relationships will automatically exist. They must be developed through the normal processes of human relationship development. However, because team members recognize the importance of positive relationships to the team's functioning, the team must devote time and effort in the early stages of its development to these relationships.

Sometimes when teams are formed, several members may already know one another. If their past experiences with each other have been positive, these relationships can facilitate the other team members getting to know each other more quickly. Care should be taken, however, to insure that the existing relationships within a team not lead these professionals to band together in a subgroup within the team, or to neglect the building of relationships with the other members of the team.

A team needs to monitor the relationships that exist among all of its members to the degree that these relationships affect the team's ability to function. If the trust between two team members does not develop, this will affect their ability to trust the team and to communicate openly. When this happens the whole team is denied access to these team members' information, ideas, and concerns. In this situation, the team can be helpful in openly discussing the factors affecting this relationship. When this occurs, the personal barriers separating the two team members are often found to be based on misperceptions and misunderstandings. In short, teams recognize the importance of human beings relating to each other in positive ways so that we can achieve the caring and service to our clients that motivated us to enter the helping professions in the beginning.

Structured Exercises to Build Stronger Teams

When new interagency or interdepartmental teams are formed as part of inservice training, it may be helpful to have the teams participate in some structured exercises to help break down the barriers that impede team functioning. The purposes of these exercises are to help team members to get to know each other as people and to allow the team to develop a sense of identity. A number of excellent resources are available for use in designing and selecting exercises appropriate to a variety of groups. Some of these are listed at the end of this chapter. Of particular relevance to trainers are the books by Pfeiffer and Jones and the work by Johnson.

Presented below are three exercises, used in the Project TIE course at Virginia Commonwealth University, that were particularly helpful to the interagency teams that were formed during the training courses. These exercises can be used together or separately. When used together, they work best in the order in which they are listed here.

Activity 1: WHERE WERE YOU BORN? An Ice Breaker (20 minutes)

When people meet each other for the first time, one of the first questions that is frequently asked is, "Where are you from originally?" Each person's place of origin is a bit of personal history that is easy to share and of interest to all. This exercise encourages interaction as the participants ask each other, "Where were you born and how far is that from here?"

Directions: This exercise works best with groups of 15-40 participants although it has been successfully used with groups as large as 100. The amount of time required increases with the size of the group. The exercise requires that everyone move around the room and position themselves relative to how far each was born from the place of the meeting. Once this is achieved, each participant tells the group his or her name, place of birth, and its distance from the meeting room.

The trainer should provide the following directions: "I want you to arrange yourselves around the room in a large semi-circle with the person who was born closest to this spot (choose a place in the room) standing here and the persons born the furthest away standing over there. Each person needs to stand in the semi-circle so that the person on your right was born closer than you and the person on your left was born further away. You may use either actual miles or driving time to determine your place. You will need to ask the question, 'Where were you born and how far away is that from here?' Now find your place in the semi-circle."

When everyone has found his or her place in the semi-circle, start with the person who was born closest to the designated spot. Ask this person to state his or her name, where they were born, and how far away that is.

This exercise usually results in lots of interaction, talking, and laughter. Frequently, participants meet other people who were born close to their hometown. In some cases, this has led to personal friendships outside the groups as common roots and values were discovered.

The exercise is a good ice breaker and helps the participants to see each other as people like themselves without reference to job, title, or departmental loyalty.

Activity 2: LABELS OF SELF - HOW I SEE MYSELF (40 minutes)

This exercise facilitates interaction, trust building, openness, and self disclosure. Participants are asked to walk around a large room in order to look at the top sheet on six piles of labels. The piles should be located in the four corners of the room and in the middle of the side walls. The labels are arranged in a specified order so that the top label in each pile is related to the others. As everyone walks around the room looking at the six labels, they are asking themselves, "Which of these labels is the closest to how I see myself?" Participants answer this question by standing beside one label. This is a forced-choice exercise and participants are not allowed to stand halfway between two labels. If participants cannot choose, ask them to decide based on how they see themselves that day. As others arrive to stand beside the same label, they should discuss their various reasons for choosing this label. It is expected that the same label will be selected by two or more participants for very different reasons. Participants are encouraged to listen for and to respect these differences. Allow enough time for everyone to share the reasons for their choice with at least two others in the same small group. At the end of each round, each person should write down the label that was selected. Then the trainer should place the top label on the bottom of each pile, exposing a new round of choices. Repeat the process through all six rounds. At the end of the activity, each participant will have chosen six descriptions to define characteristics of himself or herself. The trainer should facilitate a discussion of why words were chosen and how participants feel about the descriptions.

Directions:

(A) Prepare the labels in advance. Print large letters that can be read at a distance. Be sure the labels are organized in six piles in the prescribed order.

(B) Below are labels for six rounds. The exercise can be adapted to the specific group you are leading with other rounds that include qualities relevant to the activity or group. The numbers can help you clearly identify the labels for each round.

Six Rounds of Labels in Six Piles

	Pile 1	Pile 2	Pile 3
Round 1	QUIET	SPONTANEOUS	FRIENDLY
2	UP-TIGHT	CASUAL	INTENSE
3	ALONE	CARING	INVOLVED
4	PREPARED	DISORGANIZED	ORGANIZED
5	TROUBLEMAKER	CONFRONTER	AVOIDER
6	FOLLOWER	OBSERVER	LEADER

	Pile 4	Pile 5	Pile 6
Round 1	SHY	OUTGOING	SEPARATE
2	CONTENT	RELAXED	SERIOUS
3	INDEPENDENT	GIVING	RESERVED
4	INCONSISTENT	COMPULSIVE	CHAOTIC
5	PEACEMAKER	COLLECTOR OF HURT FEELINGS	COMPROMISER
6	SUPPORTER	RESCUER	DOER

In setting up the piles, it is essential for the trainer to have the labels in the correct order in each pile. The participants should choose from labels that have the same number during round.

Activity 3: WHO ARE WE? (45 minutes)

This exercise is designed to demonstrate how easily human beings can identify with a small group if given the chance to discover common ground and to make small decisions. The exercise can also be used to build relationships within a new team and to develop a sense of team identity. The exercise can be used with a group of any size since small groups of five or six will be created.

Step 1: (5 minutes)

Assign participants to small groups of five or six each. If you are using the exercise for team building, you will obviously have each inter-agency team work as a group. Assign each small group to an area of the room that will be "their space." Note the territorial behavior that is seen as each group marks out its area of the room. Have each group sit in a circle, but do not sit around tables if possible. Allow the groups to form as small a circle as they choose. Observe the differences among the various small groups regarding how they arrange themselves and their chairs.

Step 2: (10-15 minutes)

Each group is to go on a "verbal scavenger" hunt to find 3 to 5 things of significance that all members of the group share in common. The "things in common" can be such things as places lived or visited, personal likes and dislikes, hobbies, values, qualities, interests, education, favorite foods, unusual experiences, work history, and vacations. Each person has two tasks: 1) to suggest things we might have in common; and 2) to tell the group what is true for him or her. No one should compromise to help the group. The group only succeeds when all members can say "yes" to the proposed items.

Step 3: (10 minutes)

After the groups have discovered what their members share in common, the trainer should give the groups the following assignment: "Give your group a nickname. Choose a nickname that either incorporates some of the things you share in common or describes how you work together as a group. The nickname you choose can be as clever, creative, ordinary, or boring as you choose to make it. Try to choose a nickname that all members of your group can support. You may want to use brainstorming and consensus decision making techniques."

You will note that some groups will finish this assignment more quickly than others. When you see that a group has chosen its nickname, if time permits, you can assign them the task of selecting a theme song that is compatible with the nickname that they selected.

Step 4: (5 minutes)

Allow each group the opportunity to announce its nickname (and theme song) to the large group. Write down the names on a blackboard or flipchart.

Step 5: (5-10 minutes)

Allow each group to discuss the following questions in a small group discussion: (a) How do you like your nickname? How does it compare with the others in terms of creativity and catchiness? (b) How did the group go about its tasks? Did leaders emerge? How did the leaders behave? How did the group function when decisions were made? Were votes taken? Was consensus reached? (c) How did this group compare with the others in the room? Which group was the loudest, the most serious, the fastest, the slowest? How do you like being in this group? Would you like to change groups or stay where you are? Why?

Step 6: (5-10 minutes)

If the large group is not too big, have a brief discussion about what happened in the various small groups. How were they different? How much cohesiveness and loyalty were developed? How did the group process that was followed affect how the members felt about belonging?

Conclusions

Team building exercises such as these can help newly developing teams to build trust and interpersonal relationships and to experience some of the small group dynamics that will affect them when decisions are financially and service related. This type of training can help team members develop the skills of observing team process so that the team itself can monitor and facilitate its own functioning. Effective interagency trainers must be knowledgeable about small group dynamics and team building procedures as well as skilled in facilitating team building activities. Most importantly, trainers must develop the skills to select and use the most appropriate activities and training content for the unique needs of the participants in each of their workshops.

References and Resources

Building Teams Among Agencies and Disciplines

The following references and resources may be useful to staff trainers in increasing their knowledge of team building. Several of the resources listed below also contain sample training materials and activities which may be combined with the sample materials in this manual and adapted to the needs of individual trainers and their targeted participants.

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Section III

Delivering Inservice Training: Effective Audio - Visual Aids and Room Arrangements

By

Tony Dalton M. V. Morton
Jane M. Everson

Delivering Inservice Training:

Effective Audio-Visual Aids and Room Arrangements

Most people shudder at the thought of speaking to a group. Given the choice of attending an inservice workshop as a member of the audience or as an inservice trainer, most people would choose to remain in the audience. To assume the role of a trainer requires a higher level of emotional, physical, and mental energy than being a member of the audience. On the other hand, conducting a meaningful training session can be a rewarding and stimulating experience for both the trainer and the participants.

Most people who train other professionals are drawn into the role by those who recognize their skills in areas other than training. For example, people who are asked to make presentations may be prolific writers, skilled clinicians, or successful service providers. These professionals are asked to share their information with others based on their professional competence. Over time, their reputation as presenters may grow, but initially it is often related to skills other than training. Unfortunately, professional competence alone is insufficient to create a successful inservice trainer. The best content can still be undermined by the trainer's discomfort with presenting the information, the ineffective use of audio-visual aids (Linver, 1983), or an uncomfortable room.

This section is written for those who have been drawn into the role of inservice trainer for the first time. The primary purpose is to provide guidelines for the effective use of audio-visual aids and room arrangements.

Guidelines for Using Audio-Visual Aids

This section is designed to help trainers evaluate the use of audio-visual aids to further enhance their training style. The equipment discussed in this section consists of:

1. The overhead transparency projector
2. The 35mm slide projector
3. The 16mm movie projector
4. The videocassette record (VCR)

Suggestions for effective room arrangement will also be presented.

The Overhead Projector

Overhead projectors come in a wide variety of designs developed by a number of manufacturers. Once certain principles have been learned about the use of overhead projectors, trainers can manage the use of this piece of equipment without great difficulty. The peculiarities of the particular design and manufacture of any particular projector can be learned by attending to the projector's manual.

Overhead projectors have become prevalent as media equipment for several reasons. First, they tend to cast a clear image of the contents of a transparency onto a screen or wall. Second, the image can be changed by merely writing on the transparency with a special pen. Third, they have become reasonably portable as there are designs which fold quickly into a briefcase. Fourth, overhead transparencies can be made on most office copy machines from paper copies of wording, lettering, and designs.

Overhead projectors, regardless of their particular design, share a number of common features. They have a light source which is fairly intense, and therefore capable of projecting transparency contents on screens, walls and other uniform surfaces. Because the light source is intense, it gets hot, and bulb replacement during a presentation may often be necessary.

All projectors use a special lens which incorporates a mirror to project an image from the horizontal (the position of paper for writing) to the vertical (the position of images on a screen for viewing). Finally, all projectors use a thermostatically controlled fan for cooling the bulb. The primary rule to remember when using overhead projectors is: ALWAYS MAKE SURE AT LEAST ONE SPARE BULB IS PROVIDED. These bulbs are not like the bulbs which you use at home in a lamp; the cost of replacement may be $15-$20 per bulb.

Overhead projectors consist of a metal and plastic box which contains the bulb, the fan to cool the unit, the thermostat to turn the fan off and on, and a switch to turn the projector on. The top of the box has a glass with a fresnel (flat) lens behind it. The sheet of transparency materials rests on this glass surface for projection and writing. Mounted near the back of the projector is an arm which holds the projection lens over the center of the glass surface. A cord hangs from the front, back, or side of the projector, although some models have them stored behind doors under the box. This cord plugs into a wall/floor socket. When the projector does not come on when you throw the switch, always check to make sure that the cord is plugged in, even if you just plugged it in.

Making Transparencies

The art of making transparencies has changed dramatically in recent years. Most office copy machines can make transparencies just like paper copies. Full sheet transparency copies can be made of the contents of a picture, or of 35mm slides by some copy centers who have the proper equipment. Several guidelines for making transparencies are listed in Table 1.

Table 1

Guidelines for making transparencies

1. The size of the type on the transparency film should be larger than the type produced on most typewriters. This can be accomplished by typing the contents of an overhead with a regular typewriter in a reduced space and then having the contents enlarged with a copy machine.
2. Designing a transparency on paper is easier than on a transparency. Use paper and make transparency copies from the paper.
3. Don't put too much on a transparency. The general rule is: SIX LINES AND SIX WORDS PER LINE. Brevity is used to highlight the trainer's main points. Though this rule is hard not to violate, it results in clearer, more understandable overheads.
4. Avoid making numerous transparencies for a short session. Although some extra transparencies are useful for elaboration, too many transparencies will overwhelm an audience.
5. Handouts which include the contents of all transparencies are always appreciated, and should be handed out before a presentation begins, not in a piecemeal fashion throughout, or after, a presentation.

Some trainers may choose to hand write or print their transparencies. Others may use pens to highlight typed transparencies.

Transparency pens usually contain water-based ink. Because the ink is water-based, it is not absorbed into the transparency material. It can be washed off the transparency with a moist paper towel or sponge. There are also several brands of laundry markers which contains an alcohol-based ink. This ink will not wash off with water, but will wash off with an alcohol swab. The most convenient pens are water-based. The most permanent are alcohol-based, but they tend to dry out more rapidly when exposed to the intense light of the projector.

Using the Overhead Projector

Overhead projectors are commonly misused in a number of ways. Table 2 lists a number of points to remember when using overhead projectors.

Table 2

Guidelines for using overhead projectors

1. Always take along at least one spare projector bulb in a protected case.
2. Make sure that the lens and the surface of the glass are clean.
3. Plug in the projector. Allow it to reach room temperature before turning it on, particularly if it has been stored all night in a cold car.
4. Do not stand in the view of members of the audience when using the overhead.
5. When finished with the projector, turn it off to reduce the ambient noise from the fan motor.

Overhead projectors are designed to be used in a 6-10 foot distance from a screen. They should be placed directly in front of the screen, because placed too much to one side or the other, the projection will be distorted. Occasionally, when using more than one screen, (e.g., one screen for the overhead projector and another for slides) both the screen and the overhead projector are set to one side of the front of the room.

The projectors are designed so that the presenter can face the audience while placing and reading overheads placed on the screen. If unfamiliar with using overheads, it is helpful to practice placing overheads and aligning them with the screen before actually using them with a group.

Before changing bulbs in an overhead projector, turn the switch to OFF, pull the plug, and let the projector cool. Methods of replacing bulbs vary according to projector designs. Some access doors are in front, while other are behind the projector. None are known to require the removal of the glass surface from the top of the box. Check the manual for the particular make and model of projector for specific directions on changing bulbs.

If possible, when making a presentation, take along or request a back-up projector. If there is no back-up and a bulb burns out during the presentation, follow the directions for changing the bulb, and fix the projector during the session, while continuing to talk. It may be helpful to let the participants take a short break while the bulb is being changed. A little practice with bulb changing, using old, burned out bulbs, will pay off at such a time. It may also be helpful to carry blank transparencies for highlighting certain unpredicted points which emerge during presentation.

The 35mm Slide Projector

Basic Types of Slide Projectors

The slide projector is a frequently used (and misused) piece of audio-visual equipment. The most common design is the Carousel Projector, so named because the slides are mounted in a circular tray which is placed on top of the projector, and are fed, one at time, from the tray into the projector. The tray turns, much like a carousel, and aligns slides for viewing. Another design, the box-tray type of slide projector, uses a long tray which moves in a straight line as slides are viewed. Presenters should always consult the directions for the use of any make and model of slide projector which is to be used in training.

The Carousel Tray

There are a number of different types of carousel trays available. They vary somewhat in design and in capacity. The design variations involve the mechanism under the tray which is designed to keep all of the slides, except for the slide which is being loaded into the projector, from falling out of the tray. Many other trays have a metal, spring-loaded device, which keeps the tray secure to the body of the projector. This spring-loaded device also keeps the trainer from taking the tray off of the projector in the middle of a sequence of slides. To remove the tray from the projector in the middle of a presentation invariably results in other slides falling out of the bottom of the tray. Another more recent design of the carousel tray, uses a modified plastic ring to perform the same function.

Trays also vary in number of slides that they can accomodate. Most of the earlier trays accomodated up to eighty (80) slides. The 80 slide carousel is easier to load than the larger capacity trays. Newer trays have been designed which accommodate many more slides by simply dividing the carousel into smaller slots into which to load slides. There are trade-offs with use of either, and they apparently work equally well. The main point is to use the number of slides which will effectively emphasize the focus of the presentation.

Slides

Some slides may get warped from the effect of heat and the way in which they are stored. These are usually slides which were mounted in cardboard/layered-paper frames. If you have a choice when making slides, choose having them mounted in plastic instead of cardboard frames. Plastic frames seem less likely to warp under equivalent storage conditions. Unfortunately, when slides get warped they tend to jam the carousel projector. Considering this before putting together a presentation could save headaches during training.

Loading the Trays

This is actually not as difficult as you might think from the number of slides which end up upside down, on their sides, or which display a mirror image of words on them. A slide sequence can be put together by initially placing slides in the carousel tray in a random manner, without concern for the order, unless that has already been determined. Then do the following:

1. Advance each slide, then look at it closely. There are three things to check when looking at the image on the screen:
    a. Upside down?

    b. Reversed?

    c. Sideways?

2. Advance the projector to the next slide. Then remove the previous slide, and do the following:
    a. If it was upside down, turn it upside down.
    b. If the slide was reversed, reverse it front to back.
    c. If the slide was on its side, turn it 1/4 turn so that the contents appear upside-down to the naked eye, then drop it in the same slot.
3. Look at the next slide, and do the same with it. Continue this process through all the slides until they are in the proper orientation to be displayed on the screen. Advancing through the carousel tray again will usually help to find any slides that are incorrectly placed in the tray.
4. With your outline of the presentation available, advance through the carousel tray again. This time, however, look at each slide in relation to its usefulness to the outline. Write down the slot number of each slide's position in the carousel next to the the portion of the outline in which it would be useful. Refrain from using multiple slides of the same thing unless needed for elaboration. At this point you may have the slide which will be the first slide in your presentation in slot number 39. Using a second carousel tray, aligned in the same orientation, transfer that slide into slot number 1, keeping the slide in proper orientation.

By continuing the process the slides will be in proper order and orientation for use in an inservice workshop. Finally, mark the actual number of the slide in the sequence for the presentation on the back-top-right corner of the slide, so that it can be easily seem from just behind the projector.

Many slides come with marks or indicators on them to aid in alignment. Such indicators make the process much easier. Also, by using a slide sorting board or a light table and a magnifying glass, the program can be put together without much difficulty.

Using the Slide Projector

Most slide projectors must be mounted at a higher level than usual table height in order to be used. The closer the projector is to the screen, the higher it must be placed in order for the contents of the slide to be viewed easily by the audience. To some extent, closeness can be accommodated by making a combination of two adjustments:

1. The front of the slide projector can be elevated by turning the adjustment knob under the front of the projector. Placing a book or a block about a half-inch thick under the knob allows the projector to be aimed even higher.
2. The angle of the projection can be accommodated by tilting the screen toward the slide projector. This will keep the contents of the frame in focus.

Slide projectors with zoom lenses are the most flexible. The projector can be placed at table height near the back of the room, and the size of the projection on the screen varied by adjusting the zoom lens. This tends to keep the projector out of the way of members of the audience.

The projector should not be placed on a high audio-visual equipment cart between members of the audience and the screen as this will obstruct their view.

The OFF-FAN-LOW-HIGH switch, located on the back of most carousel projectors is extremely important. If not operated properly, this switch can cause the bulb to burn out, generally between the time the projector is set up and the beginning of the slide sequence. One rule is important to remember. ALWAYS, AFTER PROJECTING SLIDES, EVEN IF FOR JUST A FEW MINUTES, SET THE SWITCH ON FAN UNTIL THE AIR COMING OUT OF THE VENT BEHIND THE PROJECTOR IS COOL. THEN AND ONLY THEN SHOULD THE SWITCH BE TURNED TO 'OFF'.

The fan keeps the bulb from burning out while the projector is in operation. Turning if off suddenly and not continuing to cool the area around the bulb allows heat to build up and the bulb will burn out. There is another time to set the switch to 'FAN'. If the projector has been left in a car trunk overnight, and the temperature has fallen to near freezing, if you turn the switch to 'HIGH' to check out the machine, the bulb may burn out due to the extreme change in temperature. To prevent this from happening, store the projector inside overnight, and/or set the switch to 'FAN' until the air coming from the projector vent is at room temperature, before switching it to 'LOW,' and then, 'HIGH".

Spare Bulbs

Always keep at least one spare bulb in a protected case when using a carousel projector. Regardless of the precautions you take, a bulb will occasionally burn out. Learn how to change the bulb by reading the operating manual for the projector. For most slide projectors the bulb is changed through a small door under the projector. There is usually a small metal lever which aids the process. Make sure that the projector has cooled and that the cord has been unplugged before opening the door and retrieving the burned out bulb. The small lever helps to keep your fingers off the bulb and extends the bulb's life.

Jammed Slides

Aside from bulbs burning out, jammed slides, which jam the tray and stop the training session, are possible. Slides tend to jam when when they get frayed or warped. Occasionally, a maltreated tray is to blame. All you can do is try to fix it in mid-sentence, and hope that the slide which has jammed the projector is the only one that will jam. The first rule to remember for doing this is: ALWAYS CARRY A DIME. On the top of a carousel projector sits the tray. It is locked onto the top of the projector in every slot position except for the position it is in when first mounted. In the center of the top of the projector is a slot. By placing a dime in the slot and turning it, the tray can be removed at the same time from the projector. The second rule is: BEFORE YOU TAKE THE TRAY OFF THE CAROUSEL, MAKE SURE THE LOCKING RING IS IN PLACE ON THE TOP OF THE TRAY. If the ring is missing, and you take the tray off the projector, then turn it upside down or sideways the slide sequence can end up on the floor. Rule three is: RETRIEVE THE JAMMED SLIDE. This is simply done by pushing the advance button. Usually the slide is the problem. Place the tray back on the projector in the same position it was in (use your dime again to release the lock) and settle the tray into the mechanism. If you practice this outside of the meeting room setting, you'll be able to fix a jammed tray while continuing the discussion and without loss of continuity.

The Remote Switch

This switch is a mystery. It usually works, but will stop working for some unknown reason in the middle of a slide sequence. It is a small switch attached to a thin wire which plugs into the back of the slide projector. The wire can be damaged by pulling the wire to unplug the switch from the back of the projector. The switch should always be unplugged from the back of the projector by pulling the plug at its base.

If the switch stops working in the middle of a sequence, the best available option is to get someone from the audience to manually advance the projector on command. An extension cord can be used with the remote switch to give the presenter more space to move in while showing slides.

Slide-Tape Equipment

Slide projectors can be linked to tape decks which advance the slides in response to programmed signals. Although these are useful in situations in which no one is available who has knowledge of the sequence, a slide-tape presentation multiplies problems of equipment management. If the trainer is also the person whose voice is heard during the slide-tape presentation, the tape portion may be unnecessary, as most participants prefer a live presentation. If the trainer is not the person who developed the slide-tape, but is still knowledgeable, a live presentation is still preferable. However, if the trainer lacks the knowledge contained on the tape, the slide-tape may serve as a security blanket until the knowledge is attained. The authors' bias is clearly in favor of a live presentation according to a script/outline, but slide-tape shows are useful for trainers in new workshops or as a break during a lengthy workshop.

Video Cassette Recorders (VCR's)

Types of VCRs

VCR's are now widely available as a training tool. The old half-inch reel-to-reel recorders which were cumbersome to use and handle have given way to new, light, half-inch machines which use videocassettes. These new machines come in two major types: Beta and VHS. Beta machines generally have slightly better picture quality, but tend to record less on a cassette than the VHS machines. The VHS machines are more frequently available. A new format, the 8mm machine, primarily used in camcorders (a camera with a recorder built in) is growing in popularity. An older format, still widely available in universities and other educational settings, is the three-quarter inch, or U-matic, machine. The most significant thing to remember about VCRs is: TAPES RECORDED ON A MACHINE OF ONE TYPE MUST BE PLAYED ON THAT SAME TYPE OF MACHINE. If you have a tape available that you want to use in a training session, you must get a machine of the same type in order to play it. Table 3 illustrates the characteristics of different video equipment.

Table 3

Characteristics of Video Tape Equipment

Machine Format	Tapes Available	Maximum Time/Tape	Cost Per Tape	Picture Quality	Availability
U-Matic	3/4" U-Matic	1 Hour	High	Good to Excellent	Low
VHS	1/2"		Low	Fair to Good	High
	T-120	6 Hours			
	T-160	8 Hours			
Beta	1/2" L-750	4 1/2 Hours	Low	Good Very Good	Moderate
8mm	8mm	1 Hour	High	Good	Low

As can be seen from the table above, there are advantages and disadvantages with each format. Within each format, there are a number of manufacturers for both machines and tapes. The quality varies somewhat among manufactures. Presently, the VHS format is the most widely available with adequate picture quality for use in training. The U-matic machines are heavy-duty machines which produce excellent results, but are not that much better, given the cost and weight of the machine, than VHS or Beta. All of the newer machines, because they have been designed to be used in the home, are relatively reliable and easy to use. It would be impossible for us to cover all of the variations in the operation of VCR's. Trainers must become familiar with the manual for the operation of the specific machines which are to be used. However, there are several overall recommendations which may be helpful.

Recording

In recording for training, the goal is the assure the highest quality recording possible. For instance, always select the fastest recording speed which will result in the highest quality picture. On VHS format machines the following speeds, as depicted in Table 4, result in variable quality.

Table 4

VHS recording speeds and resulting quality

Speed Setting	Time/ T-120 Tape	Quality
EP (Extra Play)	6 Hours	Fair
LP (Long Play)	4 Hours	Fair-Good
SP (Standard Play)	2 Hours	Good/Very Good

The 'SP' setting is the fastest recording speed and the one that should always be used. You may only get 2 hours of material on a T-120 tape, but the picture which will be seen by an audience will be of significantly higher quality than either of the other settings.

Monitors

A monitor is essentially a TV set with connections designed to accommodate the special connectors which are used with cameras and recorders. A few years ago recorders were difficult to use with the standard home TV. A special device, called an RF Converter had to be plugged into the recorder which converted the signal to a signal like the one which is picked up by the old rabbit-ears antenna. Wires were connected to the VHF antenna connections on the back of the TV, and the converter simply functioned like a miniature TV broadcasting station. These converters sometimes really functioned like TV stations and broadcast the signal beyond the intended TV set, affecting others. Now, any TV set can function as a monitor, so you do not always have to carry a monitor with you when you train. If you can arrange for a 19" portable TV set, the operating manual for the specific format and design of VCR you want to use should be very adequate. This is true for the VHS and Beta machines, but not necessarily for older and U-matic machines, which were designed for special monitors. The best advice is to always set up the machine in a stress-free environment before using it in training.

Using VCRs

VCR's cannot produce a picture by themselves. You can hook up the same VCR to a 23" monitor or television set or a 19" portable. The variable which affects the usefulness of the VCR is the size of the TV screen. With a larger screen it is possible for a larger group to view the contents of a VCR tape. For a very small group (10 or less) a 13" monitor may be suitable; for a group of up to 30, a 19" monitor may be necessary. For larger groups (up to 50) a 23" television set/monitor and preferably two monitors will make the tape easily visible to all members of the audience. In general, the larger the monitor, the better the tape will communicate the information to the participants.

If the VCR is the only media in a presentation, it should be placed in the optimum position in the meeting room so that the entire audience can comfortably view the image on the screen. In most cases, however, VCR's will be used in combination with an overhead projector or a slide projector. In these situations, placement of the monitor in the optimum position will interfere with the use of other equipment. It is advisable to mount the monitor on the top shelf of a media cart, and the recorder on the middle shelf. The cart should be placed to one side or the other of the screen, and moved to the center of the room during the time when it is needed. As indicated above, the VCR and monitor should be connected and the picture checked out before the presentation.

Care of Equipment and Tapes

The biggest advantage with VCRs is that they now are very reliable. There are no bulbs to burn out and they are significantly more free of problems than they used to be, although dirty tape heads can cause a loss of picture.

Fortunately, because the tapes are concealed in a cassette there is less likelihood of dust or moisture getting to the tape to ruin the picture. The main thing to remember is that a well cared for VHS or Beta machine is more reliable than one which is not. Even with a well maintained machine, a videotape stored in an excessively hot or humid environment may deteriorate or malfunction.

The 16mm Projector

Basic 16mm Projector

The 16mm projector is the most commonly used projector. This piece of equipment may eventually be replaced by large video screens which hang on the wall. They're not available yet, but the field is moving towards this capability. In the meantime, 16mm films, and the projectors necessary to project them, are a useful and appropriate medium to use in training. Actually, projectors today function quite well. Unless you are very mechanically inclined, it is best to use self-threading projectors, of which there are a number of models by alternate manufacturers. Such equipment is fairly reliable, and when problems occur, they tend to be caused more by the operator or the way in which the film is handled in use. In this section we will deal with the projector, the take-up reel, and the film.

The Projector

An advantage of 16mm projectors is that they can be used in either a small room or a large auditorium. The 16mm projector has picture and sound both recorded on the film. The projector is simply a machine which takes the strip of film from one reel, passes it in front of a bright light and over a sound head, and stores the film on a take-up reel. Depending upon the lens, and its capacities, the picture can be projected from various distances. But like a flashlight, the greater the distance from the screen, the more the picture spreads out, and the more important it becomes that the room is dark. In very large places, like a movie theater, the 16mm picture would begin to noticeably suffer in quality. In the opposite direction, it is possible to preview a 16mm film in an office where the opposite wall is only 10 to 12 feet away, sometimes without dimming the lights.

Like the overhead projector and the 35mm slide projector, a light source which is capable of projecting images with high intensity is necessary. The 16mm projector has a bulb which produces a lot of light and therefore, heat. The bulb should never be touched or examined without the projector being cool. Bulbs do burn out, so it is a good idea to have a spare available. The bulb should be the type recommended for that particular projector, and should be handled as little as possible following the instructions of the projector and the bulb manufacturer. If you do not know how to change a bulb, get out the manual for the particular model of projector which you will be using and, without touching the bulb itself, go through the directions until you can get to the bulb and can see how it is changed. Avoid touching the bulb as this sometimes leaves a small amount of oil on the bulb which can shorten its life.

Using the 16mm Projector

In setting up the projector, it is best to position it near the back of the room in which it is to be used. The best rule of thumb is to set it at a distance from the screen on which it is to be projected which causes the screen to be full from one side to the other. Then walk about the room and check the quality of the picture from the perspective of the members of the audience. How well can the film be seen and heard from the back of the room? How well from the front and the sides?

Loading the Film

Films have a blank strip of film called a leader attached to the beginning of a reel which is used to thread the film into the projector. For self-threading projectors particularly, the end of this strip must be neatly trimmed in order for it to be properly threaded when inserted in the self-threading slot. Some projectors have a built in clipper mounted on the projector to use in order to clip the leading edge of the film. So, when you are having trouble with a self-threading projector, you should always look at the leading edge of the film to make sure that it is not split, bent, creased, or distorted in any way. If it is, clip it. If it is not, clip it anyway and insert it again. If the film still doesn't thread properly, make sure that the self-threading mechanism is properly engaged. If the film still does not thread, even after engaging the mechanism and clipping the end of the film, unroll a bit of the film to make sure that the film was rewound after its last use. If it was not rewound, the first thing that will come off of the reel is the end of the film you want to show. And, because sprockets that move the film through the projector are on one side only, the film cannot be loaded. it must be rewound first. This, and several related problems are why we recommend: ALWAYS LOAD AND ADJUST THE PROJECTOR AT LEAST AN HOUR BEFORE THE SESSION BEGINS.

The Take-up Reel

The recommendation for a take-up reel is: ALWAYS MAKE SURE THAT YOU HAVE A TAKE-UP REEL LARGE ENOUGHT FOR THE FILM YOU WANT TO SHOW. Many trainers have been caught with either no take-up reel or a take-up reel which is too small. In either case, go to the yellow pages and find a camera store that stocks a large enough take-up reel for the film. If you arrived at the training site early enough you may have enough time to get one. If there is no camera store, try the public library. Although we do not recommend it, some trainers have been known to use a large cardboard box in place of a take-up reel.

Another problem that can arise with take-up reels is that they may be warped by being stored inappropriately. The most inappropriate way to store take up reels is to stack them like a stack of poker chips, and then put something heavy, like a 50 minute film on top. Invariably, it will cause the stack to lean to one side and bend the take-up reels below it. When these reels are then used as take-up reels, they will grab the film every time the warped side comes around and the results can be awful for the audience and the trainer. The appropriate way to store take-up reels is to stand them up in the same relative position that they are in when in use. They should not be packed together too tightly, and they should be checked before each use for warping.

Adjustments

There are several important adjustments which should be made when the projector is being set up. One is the sound and tone levels. These can be checked at the same time as the quality of the picture from different areas of the room. A second adjustment is the focus. If the picture is fuzzy, use the focusing adjustment to make it clear. The height adjustment, on the front of the projector, allows for the picture to be elevated so that everyone can see it. In most cases, it is advisable to elevate the picture to the top of the screen when setting up. Other adjustments only come up while the film is being shown.

An excessive clicking sound accompanied by the picture on the screen jumping means that the film is threaded too tightly (this almost never happens with a self-threading machine). The best way to stop this is to stop the projector and make the little loop of film just above the lens larger. Practicing the adjustment of this loop a few times should suffice. There is another adjustment which may be required - the framer adjustment. You use this when there is a bit at the top of the picture and at the bottom of the screen. By turning the control for the framing of the picture, you should be able to clear it up. Again, practicing ahead should prevent problems when showing a film.

So, you did the following: You got in the room an hour early. You carefully loaded the film and take-up reel on the projector, threaded it through, checked the sound and picture from various parts of the room, made whatever adjustments seemed required, and you are ready to show the film. What's left? Really, nothing. Everything is likely to go well. You only need to be available to make sound/tone adjustments, or focusing adjustments. When the film has ended, let the film run all the way through the projector.

ALWAYS REWIND A FILM AFTER SHOWING IT. The next person to show the film will appreciate it. Rewinding usually requires that you change the position of the full take-up reel, and thread the film directly into the original reel on which the film is stored. Follow the directions for the particular model of projector which is usually printed on the projector's plastic case. Store it like anything perishable - in a dark place, not too hot, cold, or humid.

Effective Room Arrangements for Inservice Training

Arranging the Meeting Room

The organization and arrangement of meeting rooms is important to the enhancement of training sessions. A training session with good content, with appropriate audio-visual equipment, and knowledgeable trainers can be enhanced by a well-arranged training area or diminished by poor room arrangement. There are some basic principles to be considered in setting up meeting areas. There are also a number of variables which should be considered before meeting areas are arranged.

Principles

Adults generally come to training sessions with specific goals in mind as to what they want to learn or to accomplish. The following suggestions are offered to maximize participation and communication.

1. The room should be arranged to look as little as possible like a traditional classroom. The arrangement, as much as possible, should facilitate eye contact between the participants. It has been demonstrated that eye contact is a predictor of participants talking with the trainer and with each other.
2. Adults tend to participate more if the room fosters open communication among the participants. This is best done with something analogous to King Arthur's Roundtable. Other arrangements generally reduce the possibility of open communication among successively larger portions of the participant body. That is, in an open "U", the portion of people who cannot easily see each other "face-to-face" includes about a third of those in attendance.

3. Audio-visual equipment should be as unobtrusive as possible. It should be located in positions appropriate to the function it serves, and out of the way when not in use. When audio-visual equipment is used it should enhance a presentation. Therefore, it should be "accessible" to everyone in the group. Not being able to see or hear such media can be frustrating to participants.
4. Aesthetics as well as environmental comfort are important elements to the arrangement of meeting rooms. The room should not be overstimulating. Nor should it be barren. Furniture (tables and chairs, etc.) should be standard and in good repair.
   If tables are used, they can be covered with tablecloths. The number of chairs placed at tables should not force people to sit too close to each other or personal space will be invaded and participants will generally be uncomfortable. The room should not be too large nor too small for the number of people participating in the training. Given a choice, it is probably better to have it a little too large than too small. Arrange some break area outside of the area required for the training session. Arrange the room so that people who need to go to the restroom do not have to walk in front of the group or interfere with the trainer's materials.

There are several other variables which also need to be considered in relation to aesthetics and environmental comfort. Arranging a room for 300 participants requires something different than a training session for 20 or 30. Generally speaking, as a group gets larger, the degree to which each person can see, hear and interact with every other person is sacrificed so that everyone can see, hear and interact with the presenter.

Types of audio-visual equipment used also need to be taken into consideration. The standard TV monitor is good from about 20-25 feet. Beyond that distance people must strain to see. Projection TV's, even though they may be larger, must be viewed within a certain angle to the plane of the screen. On many, anyone viewing the picture from more than about 45 degrees to one side or the other will have difficulty. Placing multiple monitors in various areas of a very large audience is sometimes an acceptable accommodation, but the sound may need to be amplified. The overhead transparency projector is likely the best piece of equipment because it can stand near the speaker and yet project its contents, given that adequate transparencies are made, so that both small groups and large groups can see well. 16 MM film projectors and slide projectors are usually located more distant from the front of the room, and may be positioned within the audience.

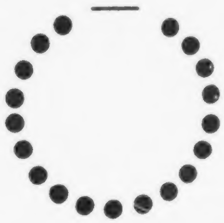
The length of time that people will be in the meeting room(s) makes a difference. The longer people will be in a single room the more sensitive we have to be to the effects of environment and aesthetics. A schedule which varies the settings in which participants find themselves will be more stimulating than one which takes place within a single meeting area. Finally, the size of the available room is also a variable. Occasionally, the appropriate room is not available, and certain adjustments have to be made. For instance, if a room is designed for about 20 people seated at tables in an open "U", it will probably be far too small for a group of 45 people to be seated in a similar way.

There is no absolute way to arrange meeting areas for training. Most facilities were designed for multiple purposes. When used for some other purpose, or a single purpose, accommodations are necessary. The main recommendation in this area is to try and visualize the effects of the room's arrangements on participants. Be alert to the effects of room temperature, smells, lighting, sounds, etc., on participants, and the effects of aesthetics, as well. The drawings that follow outline examples of some room arrangements trainers may wish to explore.

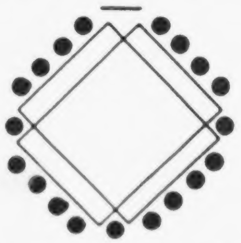
Table 5

Arranging Inservice Training Rooms

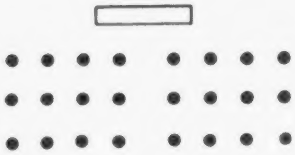
1. Chairs in a Circle



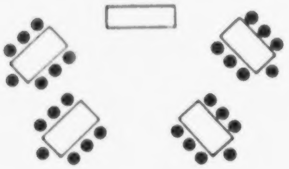
2. Tables/Chairs in a Diamond



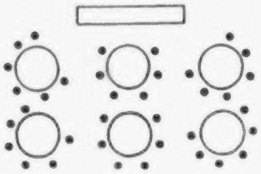
3. Theater Style Chairs



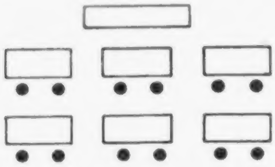
4. Herringbone Style Tables/Chairs



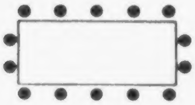
5. Banquet Style Tables/Chairs



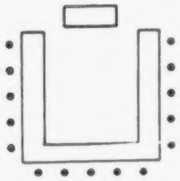
6. Classroom Style Tables/Chairs



7. Conference Style (small group)



8. U-shape Style Tables/Chairs



Adapted from:

Knowles, M. (1980). The modern practice of adult education [illegible] *Pedagogy to Andragogy*. Chicago: Association Press, Follett Publishing Company.

Robinson, R. (1979). *An introduction to helping adults learn and change*. Milwaukee: Omnibook Company.

Table 6

Guidelines/Recommendations for Use of Audio/Visual Materials

SLIDES	-Slide shows should not be more than 15 minutes in length -Use as part of short (1-2hr) presentation to give an overview of an entire model or process (e.g., an ITP meeting, the supported work model) -Use to isolate and accent components of a model or specific strategies (e.g., prompting techniques, job development) -Use to describe a case study from start to finish (e.g, a student's job placement through follow-along)
VIDEO	-Video clips should not be more than 5-8 minutes in length -When field experience is not feasible, video can be used to illustrate situations to be analyzed (e.g., environmental analysis, behavior analysis on jobsites -Effective to differentiate between major components of models (e.g., work crew, enclave, supported competitive employment) -Effective to demonstrate "before" and "after" (e.g., sheltered training vs. integrated training) -Use to illustrate application of training strategies be discussed
	- Overheads should have no more than 10 lines per page and 7-8 words per line - Effective to present factual information (e.g., data, legislation, definitions, etc.) -Use as lecture or presentation outline for trainer and participants

Developed By: Mike Barcus, Jane Everson, Sherril Moon & Paul Wehman

References and Resources for Delivering Inservice Training: Effective Audio-Visual Aids and Room Arrangments

The following references and resources may be useful to staff trainers in increasing their knowledge of the use of audio-visual materials and effective room arrangements for inservice training.

Knowles, M. (1980). The modern practice of adult education. In *Pedagogy to Andragogy*. Chicago, IL: Association Press, Follett Publishing Company.

Linver, S. (1983). *Speak and get results. The complete guide to speeches and presentations that work in any business situation*. New York: Summit.

Robinson, R. (1979). *An introduction to helping adults learn and change*. Milwaukee, WI: Omnibook Company.

Section IV

Guidelines for Training Parents as Part of Interagency Transition Planning Teams

By

M. V. Morton
Jane M. Everson
Sherril Moon

With Contributions From:

Kay Barnes, Gay Bowen, Martha Brookes
Ginger Clubine, Ann James, Kethya Jones
Corey Moore, Andree Stanford, and Brett Wilson

Guidelines for Training Parents as Part of Interagency Transition Planning Teams

> "Transition can't magically happen when a student is a year or two away from leaving school, it has to be a thought-through procedure. Transition has to include collaboration between parents and the different services or it all falls apart."
>
> --a parent

Introduction

In 1975 the Education for all Handicapped Children Act (P.L. 94-142) was signed into law ushering in a new decade of special education services. Although parental involvement in developing their child's IEP is a right guaranteed by this law, a growing body of literature indicates that active involvement, which results from effective parent-professional relationships, is frequently lacking (Bronicki & Turnbull, 1987; Goldstein, Strickland, Turnbull, & Curry, 1980; Lipton, 1982; National Committee for Citizens in Education, 1979; Pattison, 1982; and Turnbull, 1983). Peters & Noel (1982) cite lack of professional training in communication skills, parent and professional fear due to insufficient knowledge, and lack of trust from parents toward professionals as primary reasons for poor interactions.

Much of the literature on transition discussed in this manual and elsewhere supports parents' active involvement in the transition process (e.g., Brotherson et. al., in press; Connel, 1986; Ferguson & Ferguson, 1986; Goodall & Bruder, 1986; McCarthy et al., 1985; and Wehman et al., 1985). Although parent support has been shown to be a predictor of placement and success in employment (Wehman, Kregel, & Barcus, 1985) and residential programs (McDonnell, Wilcox, Boles, & Bellamy, 1985), there are growing indications that parental involvement in ITP planning will not be much different than in IEP planning (Goodall & Bruder, 1986). If transition is to be a meaningful process, parent-professional communication must extend beyond merely signing the ITP. The addition of adult service providers in the IEP/ITP planning process makes further demands on parent-professional communications. Efficient communication can result in meaningful outcomes for students with disabilities, but only if both parents and professionals are willing to share expertise and responsibilities. Increasingly, parents are voicing their opinions about the transition planning process and expressing their needs for their offspring (Anderson, Chitwood, & Hayden, 1982; Brotherson et al., in press; Connel, 1986; and Ferguson & Ferguson, 1986).

This section presents a variety of parents' opinions regarding transition issues and parent training. The section has three purposes: 1) the first is to share a variety of parents' perspectives on improving parent-professional communication; 2) the second is to present a number of parents' perspectives on vocational training, transition planning, and supported employment; and 3) the third is to provide an assortment of suggested parent training techniques.

The ten parents, whose views are expressed in this article, are all parents of children with disabilities. They are also professionals in the field of developmental disabilities and they represent a variety of agencies including: the Transitional Employment Center in Wichita, Kansas; The Association for Retarded Citizens Transitional Services Center in Raleigh, North Carolina; The Transition Project in Newark, Delaware; the

Parent Resource Training Center in Hampton, Virginia; the Developmental Disabilities Council in Cheyenne, Wyoming; the Tennessee State Department of Mental Retardation in Nashville, Tennessee; and the Association for Children and Adults with Learning Disabilities in Montgomery, Alabama and Millsboro, Delaware. Their sons and daughters range from elementary school aged to young adults. All of these parents participated in the Project Transition Into Employment (TIE) inservice training program offered at the Rehabilitation Research and Training Center of Virginia Commonwealth University in Richmond, Virginia. The Project TIE course was designed to train teams of special education, rehabilitation, and developmental disabilities professionals and parents who have been identified as leaders in their state to serve as statewide transition team trainers for local school transition teams. These parents represented their states as members of interagency transition planning teams. During the training course, Project TIE staff talked frequently and informally with parents and encouraged them to share their concerns about transition planning. Their input on their perceived roles in the process with the trainers and other participants was invaluable. Their concerns, and our own concerns as trainers, were the impetus for this section of the manual. It is our belief that professionals often encourage parental involvement in inservice training to varying degress, sometimes successfully and sometimes less so. This section is designed to assist trainers in understanding parental concerns with transition planning and to assist them in eliciting active involvement from parents during inservice training.

Interview Questions

The ten parents who participated in the Project TIE course were asked if they would like to contribute to a section dealing with parents' perspectives on the transition process. Nine parents agreed. After the training course each parent was interviewed by telephone and asked to respond to the questions below:

1. How can parents and professionals work together to improve communications and make the school to work transition process effective?
2. What do you, as a parent, think is most important about vocational training?
3. What do you, as a parent, think is the most important thing about transition planning?
4. What do you, as a parent, think is the most important thing about supported employment?
5. What specific techniques are the most effective in training parents?

Summary of Common Themes and Responses

1. ACTIVE parental involvement in the IEP/ITP planning process needs to increase.
2. Vocational training is most effective if it is FUNCTIONAL, COMMUNITY-BASED, and BEGINS EARLY in the education process.
3. Transition planning needs to occur and result in EMPLOYMENT OPTIONS.
4. INTEGRATED vocational options for people with severe disabilities are increased through supported employment.
5. PARENTS are the most effective trainers of other parents.

The following section further explains the parents' responses to each of the above questions. The responses are presented as both direct quotations and paraphrased replies.

Question 1: How can parents and professionals work together to improve communication and make the school to work transition process effective?

> "The Individual Transition Plan has to be developed together - parents have the most information about their child and know their child best. Professionals delete a valuable source of information if they don't plan and write the transition plan with the parents."
>
> --a parent

The parents unanimously agreed that if parents are actively involved and included in developing the IEP/ITP, it offers an effective way to form a strong parent-professional partnership. Although P.L. 94-142 mandates parental input and involvement, it was felt that mandates had not been enough to insure that parents' involvement extended beyond merely signing a completed IEP. It was felt that more information about the student and more parent ownership for the transition plan would result from parents and teachers developing and writing the transition plan together. Many times professionals think parents don't care or want to be involved but in fact, professionals may not be understanding parents' feelings about transition issues. One parent commented, "Professionals need to let parents get through the "feeling part" of transition instead of getting bogged down in solving problems. If professionals let parents express their feelings and talk it out, then they'll be able to work together. The problem of having the handicapped child is never going to be solved."

Parents felt that training was needed for professionals in how to work with families since family members often end up getting labelled if professionals aren't aware of how and why parents or siblings feel the way they do. A parent stated, "Professionals should be able to individualize how to get parents involved based on where they are; not where professionals think they should be. All parents are not the same."

Over half of the parents mentioned that personal, informal contact with their son/daughter's teacher facilitated on-going and steady parent-professional communication. Informal and on-going communication led to a more open and natural flow of communication at formal planning meetings. It was felt that the more parents and professionals dropped their barriers and really got to know each other the more it helped to solidify a common ground and clarify the priority--helping the student.

Finally, consensus revolved around the need for more parent and professional training. Systems and advocacy training was seen as high priority for parents while training in facilitating communication and active involvement was emphasized for professionals. All parents are not the same and professionals need a variety of skills to assist parents in becoming involved. Overall training needs, for both parents and professionals, included the development of active parent-professional partnerships.

Question 2: What do you, as a parent, think is most important about vocational training?

> "Vocational training has got to be real world experience--community based training for actual job possibilities."
>
> --a parent

Two common themes emerged from parent responses in this area. First, parents unanimously expressed the need for students to have a variety of real work experiences in the community. Community-based training would develop work skills and promote self determination of the student. They wanted their sons and daughters to have a number of marketable skills and accompanying positive attitudes toward work to better enable them to make a choice about what they wanted to do when they left school. One parent remarked, "Vocational training should offer a variety of vocational experiences in a variety of areas that will help in broadening opportunities and increase the chances for students to make up their own minds." Another parent said, "Vocational training needs to be thought of as an educational component rather than as something separate from the regular curriculum--parents and teachers buy into the academic and developmental model rather than focusing on what the kids will functionally need."

The second common theme was that community-based vocational training should start early--at least by sixteen years of age. A number of parents remarked that starting community-based vocational training at this age would do two things: 1) give students adequate time to develop work and work related skills, and 2) give parents time to raise their expectations and consider vocational options.

One parent stated, "Parents don't know any employment options exist and if parents don't know this, transition won't even come to their minds. They need to know early, what vocational options are out there."

Question 3: What do you, as a parent, think is most important about transition planning?

> "The darker colors are how the child's future is presented to the parents. The low expectation can be very influential."
>
> --a parent

Parents' overall consensus on transition planning was that it simply needs to occur. As one parent summarized, "Transition is the new word for the 80's." They also emphasized the key role that parents must play in the transition process. Another parent remarked, "The transition process should begin with parents because they're the most consistent persons in the student's life and they know the student best."

One of the most complex issues involved in the transition process is the effective collaboration and cooperation required from a variety of service providers. Again, parents need to know who these people are and what services they can provide in order to most effectively obtain services for their sons and daughters. Parents felt that one of the biggest strengths of transition planning was that it specified responsibilities and timeliness for ensuring vocational outcomes. One parent stated, "The most important thing about the individualized transition plan is that it designates what the school will do, what the parent will do, and what the adult service provider will do to ensure an employment outcome when the student leaves school." This parent went on to say, "I am now getting three calls a week from parents who are wanting vocational outcomes for their children and want to know how to get it started."

Question 4: What do you, as a parent, think is most important about supported employment?

> "A mother, who desperately needed services for her graduating son, recently called me. What she was trying to say was that her son needed supported employment. When I explained the concept to her, she broke into tears."
>
> --a parent

Parents' views on supported employment focused on two common themes. First, parents shared enthusiasm for supported employment because it created new employment options for their sons/daughters. Statements included, "Supported employment will enable my child the increased opportunity to do more vocationally, it offers more vocational options and a higher skill level job," and "Supported employment is helping to make people with severe disabilities productive members of society--this is the reason for the community to promote supported employment." Parents expressed strong favor for the development of supported employment programs because they offered work opportunities to people who have traditionally been excluded from employment because of the severity of their disability.

The second common theme that emerged concerned integration. Parents felt frustrated that many schools and the majority of adult services were provided in segregated settings. Parents remarked, "Supported employment is helping to fully integrate people--people without disabilities are finally learning about people with disabilities. Job coaches are really helping the socialization with co-workers." Another parent commented that, "Although there are no quick fixes, supported employment options offer people with severe disabilities the fullest access to the work place."

Question 5: What specific techniques are the most effective in training parents?

Overall, parent training should be considered effective as long as it meets the needs of parents. Because parents are individuals with unique needs, no one method is best and probably a variety of training techniques will reach the most parents. The guidelines in the following table were suggested by the participating parents as the most effective training techniques.

Table 1

Guidelines for Effective Parent Training

1. Using parents to train other parents creates credibility, confidence, and trust. There is no reason for a parent to say community based vocational training works unless it really does. Parents are likely to be honest and upfront with their concerns and expectations and the changes in these concerns and expectations over their offspring's lifetime.
2. When talking about supported employment options, use experiential examples or video tapes of people actually working. Before and after videos are especially enlightening in regard to changes in behavior and the advantages of integrated work settings. Presentations on community based training can also be effectively done with slides and/or videotapes. Individual case studies providing qualitative information are more personable and individualized than quantitative data on large groups.
3. Seminars on employment options can be given through the school once or twice a year to give parents information. If parents don't have the information, they may not know they should be looking at vocational programs. Suggestions and strategies should be given on who to contact for more information, where to contact them, when to contact them, and what to ask for.
4. Taking parents and the student to visit possible work sites while the student is still in school can help both parents and the student feel more comfortable about the transition from school to work.

5. *Transition issues can be presented through a panel consisting of a combination of parents, professionals, and adults with disabilities who have completed the school-to-work transition process*.
6. *Use parent-professional team training to educate parents about the real situations that will occur as a result of their son or daughter working*. Issues such as social security, medicaid, transportation, support groups, guardianship, and residential services are among the requested topics.
7. *Ask adults with disabilities, including mental retardation and other developmental disabilities, to present their views and experiences with transition* at an A.R.C. meeting, parent group meeting, or "back to school night" presentation.
8. *On an individual level, personal involvement and seeing the family as a system is very important*. Home visits can provide an effective way to gain valuable knowledge about the student and to establish stronger rapport with the family.
9. *Organize a panel of parents at different stages in the transition process* to present their ideas and concerns about transition planning in their community.
10. *Ask a number of different adult service providers to describe their programs at a parent meeting*. Have the service providers stay during refreshments for informal questions after the meeting is over. Ask each presenter to bring brochures and literature about their program.
11. *Use parent-professional collaboration to develop a school brochure on transition for parents*. Include basic non-technical information on what transition is, the process, and expected outcomes.

These suggestions, combined with the guidelines presented in Sections I and II, should help trainers organize more effective training programs for parents. Parents, just like professionals, are adult learners who bring with them a wealth of experiences both with their children and the service delivery system. An effective trainer can respectfully facilitate the sharing of these experiences so that parents and professionals can learn from each other.

Conclusions

The common themes emerging from this group of parent-professionals can be summarized as follows:

1. Both parents and professionals need to learn new skills in order to develop more meaningful involvement in the transition process. The IEP/ITP process requires additional demands on parent-professional communication. These parents felt that professionals needed to do a better job of listening to what parents were really saying about their needs for their children.
2. Vocational training needs to begin early (14-16 years) and consist of a variety of vocational training experiences performed in the community. These parents expressed frustration over the preponderance of vocational training conducted in segregated settings.
3. Transition planning needs to occur. The result of transition planning should be that when students leave school they have a choice of employment options in the community.
4. Community service providers should offer supported employment programs because they provide people with severe disabilities

the opportunity to become more productive members of society. Supported employment offers people, who have traditionally been segregated in our society, the opportunity for higher skill level jobs in integrated work settings.

5. A variety of training techniques can be used to effectively train parents in transition. A particularly effective technique is the use of parents as trainers.

Transition is a complex process for parents and families. This section attempts to identify a number of transition issues that are related to employment and transition planning as perceived by parents. Parents of transition aged students are the people who will consistently advocate for the student in all these areas of their lives. It is our responsibility as professionals to investigate the most effective ways of making available to parents all the opportunities and services they need to help their child be successful in the transition process.

References and Resources for Guidelines for Training Parents as Part of Interagency Transition Planning Teams

The following references and resources may be useful to staff trainers in increasing their knowledge of parent training. Several of the resources listed below also contain sample training materials and activities which may be combined with the sample materials in this manual and adapted to the needs of individual trainers and their targeted participants.

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Connel, J. (1986). The work of finding a job. *Exceptional Parent*, *16*(1), 46-50.

Ferguson, D. L., & Ferguson, P. L. (1986, May). *Families in transition: A qualitative study of parents' perceptions of the move from school to adult life for their children with severe handicaps*. Paper presented at the annual meeting of the American Association on Mental Deficiency, Denver, Colorado.

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Goodall, P. A., & Bruder, M. B. (1986). Parents and the transition process. *Exceptional Parent*, *16*(2), 22-28.

Lipton, D. (1982). Parents and professionals. In Marie Peters & Norris G. Haring (Eds.), *Building an alliance for children: Parents and professionals* (pp. 25-47). Program Development Assistance System: University of Washington.

McCarthy, P., Everson, J., Inge, K., & Barcus, M. (1985). Transition from school to work: Developing the process for individuals with severe disabilities. *Techniques*, *1*, 463-472.

McDonnell, J., Wilcox, B., Boles, S., & Bellamy, T. (1985). Transition issues facing youth with severe disabilities: Parents' perspectives. Journal of the Association for Persons with Severe Handicaps, 10 (1), 61-65.

Moon, M. S., & Beale, A. V. (1984). Vocational training and employment: Guidelines for parents. Exceptional Parent, 14(8), 35-38.

National Committee for Citizens in Education. (1979). Unpublished manuscript serving as basis for Congressional testimony.

Pattison, B. J. (1982). The early years and now: The history of the parent advocacy movement. In Marie Peters & Norris G. Haring (Eds.), Building an alliance for children: Parents and professionals (pp. 1-23). Program Development Assistance System: University of Washington.

Peters, M. & Noel, M. M. (1982). Parent perspectives about professional and parent cooperation. In Marie Peters & Margaret M. Noel (Eds.), Building an alliance for children: Parents and professionals (pp. 49-76). Program Development Assistance System: University of Washington.

Turnbull, A. P. (1983). Parent participation in the IEP process. In James A. Mulick & Siegfried M. Pueschel (Eds.), Parent-professional partnerships in developmental disability services. (pp. 107-122). Cambridge, Mass: Ware Press.

Wehman, P., Kregel, J., & Barcus, M. (1985). From school to work: A vocational transition model for handicapped students. Exceptional Children, 52(1), 25-37.

Section V

Employment Oriented Vocational Skills Training

By

Jane M. Everson

Mike Barcus Sherril Moon

M. V. Morton

Employment Oriented Vocational Skills Training

▶ What are Employment Oriented Vocational Skills?

Employment oriented vocational skills form the foundation of a secondary special education program for youth with moderate and severe disabilities and are a major part of elementary and middle school curricula. Employment oriented vocational skills are community-referenced skills that are taught in community-based settings prior to placing a student in employment. They are NOT pre-vocational skills because they are not considered a prerequisite to obtaining supported employment outcomes. Employment oriented vocational training is provided to students during the elementary, middle, and secondary school years to expose them to a variety of vocational experiences and to enable school and adult service providers to target the best employment outcomes for students during the transition planning process in the secondary years.

Who Should Be Targeted for Inservice Training?

Inservice training on employment oriented vocational skills will primarily target educators, both special and vocational special needs educators, who have daily responsibility for specific vocational skills training for youth with moderate and severe disabilities. School administrators may also be targeted for training because of their role in supporting, monitoring, and evaluating middle school and secondary level vocational training programs. Parents and adult service providers must also be provided with information about essential elements of school programs in order to assess current school programs in their locality and to holistically assess the needs of transition aged youth.

What is the Role of the Trainer?

An effective trainer is responsible for providing participants with information in four broad areas including: 1) the goals of middle school and secondary level vocational skill training; 2) the development of a community-referenced and community-based service delivery model; 3) methods of systematic instruction; and 4) procedures for implementing change in existing school programs.

Whenever possible, the trainer and the participants should assess and prioritize their training needs within these four training areas prior to the development and delivery of inservice training. As described in detail in Section I, this may be accomplished prior to the first day of training through a formal questionnaire or for more experienced (and flexible) trainers through an opening activity during the first day or hour of training. This is a critical role for the trainer to assume because it provides him or her with information not only on the participants' needs, but also with preliminary information on the skills held by the participants.

During the provision of employment oriented vocational skills training in each of these four areas, the trainer must assume two roles: 1) as a trainer skilled in the delivery of specific content; and 2) as a trainer skilled in helping participants identify issues and strategies related to implementing the material within existing school programs.

What are the Trainer's Goals and Objectives for Employment Oriented Vocational Skills Training?

Goals and Objectives

It is the role of the trainer to present information and to facilitate activities and discussions which accomplish objectives under each of the four identified training goals:

Goal 1: Goals of Middle School and Secondary Employment Oriented Vocational Skills Training:

Objective 1.1 to discuss the expected goals of employment oriented vocational training during the middle school years

Objective 1.2 to discuss the expected goals of employment oriented vocational training during the secondary school years

Objective 1.3 to identify the expected outcomes of secondary education for youth with moderate and severe disabilities

Objective 1.4 to identify the role of the special education teacher in planning and providing vocational skills training

Objective 1.5 to identify the role of the vocational special needs and/or vocational education teacher in planning and providing vocational skills training

Objective 1.6 to discuss the discrepancy between traditional curricula at the middle school and secondary levels and the achievement of the identified education outcomes

Goal 2: Development of a Community-Referenced and Community-Based Vocational Service Delivery Model:

Objective 2.1 to define a community-referenced and community-based service delivery model

Objective 2.2 to present characteristics of and examples of quality longitudinal vocational training programs for youth with moderate and severe disabilities

Objective 2.3 to discuss the rationale for community-referenced and community-based training in the vocational domain

Objective 2.4 to describe procedures for conducting a community analysis of potential jobs and job trends in the local community

Objective 2.5 to provide strategies for changing a system from a classroom-based service delivery model to a community-based service delivery model:

a) establishing administrative support
b) changing existing curricula
c) providing additional staff training and suppport
d) providing additional parent training and support
e) scheduling students and staff
f) addressing liability concerns
g) addressing transportation concerns
h) addressing funding concerns

Objective 2.6 to present procedures for effective program evaluation and monitoring:

a) managing staff time

b) managing program data

c) evaluating program outcomes

Goal 3: Methods of Systematic Instruction:

Objective 3.1 to define systematic instruction

Objective 3.2 to present a rationale for the use of systematic instruction

Objective 3.3 to discuss the use of systematic instructional procedures in community-based vocational training sites

Objective 3.4 to present the development of task analyses in community-based vocational training sites

Objective 3.5 to present the use of task analyses for vocational assessment and training in community-based training sites

Objective 3.6 to present the concept of a least to most intrusive prompting hierarchy for skill training

Objective 3.7 to discuss effective and appropriate work reinforcers

Objective 3.8 to discuss strategies for:

a) fading prompts and teacher's instruction

b) thinning reinforcement schedules

c) managing inappropriate behavior

d) modifying skills, environments, training, and/or materials to improve skill acquisition

e) assuring maintenance of skills over time

f) encouraging generalization of skills across settings, trainers and/or supervisors, and jobs

g) increasing students' productivity

Goal 4: Procedures for Implementing Change in Existing School Programs:

Objective 4.1 to present strategies for developing local task forces or advisory boards to plan and implement community-based vocational training and related issues

Objective 4.2 to present strategies for planning and implementing ongoing staff inservice and technical assistance

Objective 4.3 to present strategies for training parents and family members

Sample Training Activities and Materials for Use During Employment Oriented Vocational Skills Training

The purpose of this section is not to present a step-by step outline of activities and accompanying narration and materials for trainers to use to cover the goals and objectives in Section V, but instead to present a sample of activities and materials which trainers may use to develop and expand upon their own ideas. Based on the guidelines for developing inservice training described in Sections I-IV, it is expected that trainers will wish to adapt the following activities and materials based upon their own values and experiences, and upon the values and experiences of their targeted audiences.

Because employment oriented vocational skills are the foundation of a three-stage vocational transition process (Wehman, Kregel, and Barcus, 1985; Will, 1984), it is recommended that trainers integrate workshops on employment oriented vocational skills with material on interagency transition planning and supported employment outcomes.

Selection of the most appropriate content and activities from this section should be based on guidelines presented in Sections I-IV: 1) overall training time; 2) immediate needs of the trainees; 3) existing knowledge base of the trainees; and 4) agency and discipline make-up of the targeted trainees.

Goal 1: Goals of Middle School and Secondary Employment Oriented Vocational Skills Training

The trainer may choose to introduce this goal by presenting a brief overview of longitudinal vocational training at the: 1) elementary school level; 2) middle school level; and 3) secondary school level. Characteristics of appropriate curricula goals, student activities, methods of service delivery, and daily time commitment for each school level should be described (e.g., Brolin, 1982; Wehman, 1981; Wehman, Bates, and Renzaglia, 1985). Tables I.1-I.3 are guidelines for vocational training at the elementary school, middle school, and secondary school levels. The material in these tables may be used to develop overheads and handouts for a presentation on characteristics of vocational training throughout the school years.

Table I.4, "Essential Elements of a Quality School Program", summarizes the critical characteristics of secondary education programs which have been shown to be most effective with students with moderate and severe disabilities. This table may be used to summarize the information provided in a presentation on characteristics of vocational curricula.

The decision to use any or all of the material presented in Tables I.1-I.4, or to add or delete material depends both upon the existing knowledge base of the target audience, and upon the knowledge desired and needed by the audience. For example, parents and adult service providers may need to hear all the information provided in Tables I.1-I.4 and to view slides or videotapes of model programs in their state or other states in order to assess existing secondary programs in their localities. Special education and vocational special needs teachers may need to hear all the information in Tables I.1-I.4, have the opportunity to see slides and videotapes, visit the model programs, and be provided with information on making changes in their own programs.

An effective trainer must be skilled in combining short lecture sessions with small group opportunities for participation and internalization of ideas. Professionals and parents who participate in inservice training have a variety of backgrounds and experiences which a trainer may use to enhance his or her efforts if the activities are directed toward specific outcomes. Adults learn from active participation in workshops and are more likely to integrate material into their programs if it meets their immediate needs.

The activity described in Activity I.1 is an example of a small group activity which a trainer may use in the initial steps of employment oriented vocational skills training to encourage participants to clarify the expected outcomes they have of secondary programs for youth with moderate and severe disabilities. The actual narrative accompanying this activity will, of course, depend upon the participants' responses, and the trainer's direction in leading the activity.

Employment Oriented Vocational Skills Training

Goal 1

Table I.1

Guidelines for Vocational Training at the Elementary School Level

1.1 Become familiar with state, federal, and local regulations regarding vocational training and employment of citizens with handicaps. The earlier you become an advocate of appropriate services in this area, the more likely your children/students are to receive proper training. Lobby for legislation that enhances employment opportunities in your state.

1.2 Make sure that career awareness and vocational training are part of the IEP during the elementary school years.

1.3 Visit local secondary school vocational programs and adult training programs to determine if they match the variety of model programs that exist throughout the country. If local programs are appropriate, determine what skills you need to teach to assure your student's entry into these programs.

1.4 Make certain that the IEP addresses self-care and independent living skills, functional academics, and social skills that are needed in the work place. Such skills include eating, toileting, dressing, grooming, communication, independent mobility, money and time management, physical fitness, and appropriate use of leisure time. If these skills are taught during the elementary years, there will be more time for specific job training in later years.

1.5 Emphasize the importance and rewards of work and create opportunities for students to see and learn about different vocations. Get students into the community to see and be seen by non-disabled workers. Be certain to encourage realistic vocations such as office helper, receptionist, maid, orderly, janitor, auto mechanic's helper, food service worker, micrographics clerk, and entry level communications assistant.

1.6 Let students sample at school and at home a wide array of "work skills" applicable to realistic jobs such as cleaning tables, washing dishes, taking messages to other people, emptying trash, and answering the phone. Creating a schedule of work duties and demanding completion of duties within a time frame teaches young children/students the importance of work quality and rate.

1.7 Begin training skills in all curricular areas outside the classroom. Integration into the community and training in natural settings at early stages of learning will promote generalization of learning and acceptance by other people.

Adapted from guidelines provided by Wehman and Pentecost (1983); and Moon and Beale, (1984).

Employment Oriented Vocational Skills Training

Goal 1

Table I.2

Guidelines for Vocational Training at the Middle School Level

2.1 Continue to train communication, self-care, mobility, independent living, and recreation skills. Teach all skills within the context of job training activities whenever possible.

2.2 Make sure the IEP addresses specific vocational training in a variety of potential jobs related to realistic employment options in the local labor market.

2.3 Provide job training in a variety of school sites such as the grounds, cafeteria, office, and vocational-technical building.

2.4 Begin working with high school personnel to identify possible community-based training programs and job placements. Make sure the transition from middle to high school programs is smooth and appropriate.

2.5 Identify one or two tentative "vocational tracks" for each student so that more specific job training can occur at the high school level. This can only be done AFTER a student shows preferences, stengths, and weaknesses in a variety of job categories that have been trained in community-based settings.

2.6 Continue to work on general work habits such as neatness, promptness, time management, and responding to supervision, but within the context of specific job training. Use systematic instructional methodology and a data based system to monitor the learning of general work habits and specific skills. Documentation of learning can be used later to assist with assessment and job placement.

2.7 Provide community-based training in leisure, domestic, and community functioning domains as well as the vocational domain.

2.8 Contact rehabilitation and mental retardation adult service providers to identify availability of services and referral procedures.

Adapted from Moon and Beale (1984); and Wehman (1985).

Employment Oriented Vocational Skills Training

Goal 1

Table I.3

Guidelines for Vocational Training at the High School Level

3.1 Develop a transition team composed of the student, parents/guardians, teachers, rehabilitation counselor, case manager, and other appropriate professionals to insure movement from school to an appropriate job or post-school education as well as other needed adult services.

3.2 The transition team must formulate a formal, written plan that specifies how a student will be trained and placed in a permanent job upon graduation. This transition plan must specify who is responsible for each goal/objective of the plan and a timeline for completion of each goal/objective of the plan.

3.3 As part of the development of the transition plan, identify existing job options and target needed ones. Work with adult service providers and businesses to create new job opportunities.

3.4 Provide daily training in community job-sites in several job types that are realistic permanent job possibilities for the students. This community analysis should be an on-going process coordinated with middle school personnel.

3.5 Within the context of community-based job-site training, focus on improving work quality and production rate. Assess a student's endurance and stamina to work all day and provide opportunities to increase endurance.

3.6 Prepare job placement files with references, descriptions of acquired skills, work history, and community assessment information. Verify referrals to adult service providers.

3.7 Assist with job placement for students prior to leaving school or immediately upon leaving school. Follow-up on all graduates to make sure they are either employed or are receiving job placement services or are receiving post-secondary education.

Adapted from Wehman (1981); and Moon and Beale (1984).

Employment Oriented Vocational Skill Training

Goal 1

Table I.4

Essential Elements of a Quality School Program: Assuring a Smooth Transition of Students With Moderate and Severe Disabilities Into Post-School Environments

4.1 Curriculum is community-referenced, functional, and chronologically age appropriate.

4.2 Curriculum is longitudinal in design and delivery.

4.3 As a student's chronological age increases, the time spent on school grounds decreases.

4.4 Job training in high school involves real work experiences in a variety of settings.

4.5 Students have opportunities for interactions with peers in activities in which they share equal rank and roles in the relationship.

4.6 Systematic instructional techniques are used at school and at community training sites.

4.7 Parents are involved throughout the educational process.

4.8 Formal transition planning is a part of the IEP development by the time the student reaches age 16.

4.9 Transition planning and implementation is a result of local interagency collaboration between school and adult services personnel.

4.10 A systematic transfer of lead responsibility for a student is made from the school to an adult services agency prior to a student leaving school.

4.11 Students are placed in a job and in a community living environment with necessary support before or immediately upon leaving school.

Adapted from McCarthy, Everson, Moon and Barcus (1985).

Employment Oriented Vocational Skills Training

Goal 1

Activity I.1

Identifying Outcomes of the Educational Process

Purpose of the Activity: to assist participants in identifying the outcomes they expect from educational programs.

Target Audience: professionals and parents (up to 50 people in groups of five to seven each)

Length of Time Required for Activity: 25-35 minutes

Materials:
- overhead projector
- transparency
- marker

Summary of Activity: "Everyone in this room has been a participant in an educational program. Many of us have been actively involved as professionals in educational programs and/or as parents of children who have been participants in educational programs."

"As participants, parents, and as professionals, we have certain expectations of our educational system. We expect our educational system to provide us with a variety of skills which will enable us to achieve certain outcomes as adults."

* Have each group spend about 15 minutes discussing the following question: What outcomes do we expect as a result of the educational process which exists in the United States?

* Ask each group to generate a list of outcomes that they as a group agree should be outcomes of the educational process.

* Remind groups that they are looking for measurable and observable outcomes which enable a person to lead an adult life.

* Remind groups that they are looking for outcomes they expect as a result of education for everyone who participates in our system of education. Should we expect different outcomes for special education students than we do for regular education students?

* After 15 minutes, have one person from each group summarize his or her group's goals and write on the flipchart or transparency.

"The purpose of this activity was to identify the expectations we have of our educational system in developing adult outcomes for individuals with disabilities. Hopefully, we agree upon the same expected outcomes for ourselves as participants in the educational process as we do as parents of disabled and non-disabled offspring, and as professionals who provide services for individuals with disabilities. As parents and as professionals, we must expect adult outcomes of employment, interpersonal relationships, personal maintenance, independent homemaking, community access, and citizenship for youth regardless of the type or degree of disability they may experience."

* If we agree that these outcomes are appropriate and expected outcomes of an educational program, then why aren't they being achieved by adults with disabilities?

* The inability of adults with disabilities to achieve these outcomes is not simply the fault of our educational programs. Instead, we must evaluate both our educational programs and our adult service agencies. Currently, no one agency or discipline has the resources

to provide the most appropriate educational services, transition services, and employment services independently. Interagency and interdisciplinary coordination and cooperation are crucial components of the school to work transition process.

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Employment Oriented Vocational Skills Training

Goal 1

Activity 1.2

Identifying Roles of Educators In Community-Based Service Delivery Models

Purpose of the Activity: to assist particpants with: 1) identifying their own professional strengths and needs; and 2) recognizing the professional strengths and needs of other disciplines and agencies

Target Audience: professionals and parents (up to 50 people working individually)

Length of Time Required for Activity: 25-35 minutes

Materials:

- "I already do... I could do if I had some help..." form for each participant
- overhead projector
- transparency
- markers

Summary of Activity:

- Have each person individually fill out 3-5 skills that he or she (as a special education teacher, vocational special needs teacher, school administrator, parent, etc.) already does related to providing vocational training for students with moderate and severe disabilities. For example, special education teachers often feel that they are skilled at teaching students with moderate and severe disabilities using task analytic instruction. Vocational education teachers often feel they are skilled at assessing the local job market and identifying entry-level jobs.

- * Next, have each person fill out 3-5 skills that he or she (as a special education teacher, school administrator, parent, etc.) could use some help doing related to vocational training for students with moderate and severe disabilities. For example, special education teachers often feel they could provide vocational training in the classroom and/or in the community if they had support from the building principal and job development assistance from the vocational education teacher. Vocational special needs teachers often feel that they could provide vocational training to students with more severe disabilities if they had administrative support for smaller classes and special education support for curricular adaptations.

- * Ask participants to share their responses and summarize their responses by discipline or by position on a blank transparency on the overhead: What skills does each discipline position feel "ownership" over excusively? What skills does each discipline/position have in common? Will coordination of skills enhance service delivery? Why or why not?

- * A community-based vocational service delivery model requires an interdisciplinary approach because it requires a variety of staff skills and experiences. An understanding of general skills held by participating disciplines and agencies is often one of the first steps in establishing this model.

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Employment Oriented Vocational Skills Training

Goal 1

Activity I.2

"I already do . . . I could do if I had some help . . ."

As a ( ), I already do:

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As a ( ), I could do if I had some help:

____

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____

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Goal 2: Development of a Community-Referenced and Community-Based Vocational Service Delivery Model

The trainer may wish to introduce this goal through a brief presentation which defines the concepts of community-referenced curricula and a community-based service delivery model. This is an approach to vocational curricula development and vocational service delivery which requires instruction for youth with moderate and severe disabilities: 1) to reflect skills derived from an on-going analysis of community; 2) to take place in natural environments during natural times of the day; 3) to focus on functional activities (instead of splinter skills) required to participate in integrated environments; and 4) to be individualized according to the needs of specific students and specific communities. (Table II.1)

Because these concepts may be unfamiliar to parents and adult services professionals, as well as to many education professionals, the trainer will need to clearly differentiate community-derived curricula from pre-packaged curricula that may be purchased from educational resource catalogs, and community-based training from field trips and outings. It should be noted that community-based training can (and optimally should!) take place in all curricula domains (Falvey, 1986), but that the focus of this section is on longitudinal employment oriented vocational skills provided by school systems for students with moderate and severe disabilities prior to actual job placement. Table II.2 presents a rationale for community-based vocational skills for youth with moderate and severe disabilities. The trainer should note that many skills in other curricula areas can be taught as part of community-based employment training in natural and functional environments. (Brolin, 1982; Falvey, 1986).

Although there are many similarities in implementation, employment oriented vocational skills must be differentiated from job-site training which follows job placement in the supported competitive employment mod (see Section VII). Employment oriented vocational skills are part of a longitudinal curricula process provided by school systems that culminates in one or more community-based training experiences in real jobs in real job settings. The vocational experience may or may not be paid and may or may not result in job placement at the specific job in the specific business or industry in which the student received community-based training. The purpose of community-based vocational experiences is to provide students with a variety of time-limited experiences and specific skills from which a job placement choice may be made. An important characteristic of community-based vocational training is the student's ability to practice and refine skills in a variety of job types. Job-site training, as a component of supported competitive employment, provides specific job skill training after a specific job placement has been secured. An optimal school program will provide a student with longitudinal vocational training including the opportunity to practice skills in a variety of job types during the early secondary years through community-based vocational training and will also provide supported and non-supported employment job placement and training services before a student leaves the school program.

Employment oriented vocational skills which are community-based must reflect potential job openings and job trends in the local community. Curricula must be derived from the local community and must approximate the demands of a competitive job environment. Teachers and other service providers will often need to be trained how to assess the local community for potential jobs and how to establish community-based vocational training sites. Table II.3 provides an overview of the types of vocational training sites typically available in a community. Both the strengths and limitations of each type of site should be discussed. Table II.4 describes the steps in establishing community-based vocational training sites. Activity II.1 enables participants to apply the information they have learned so far by conducting an assessment of a potential vocational training site.

Employment Oriented Vocational Skills Training

Goal 2

Table II.1

Definition of Community-Referenced and Community-Based Vocational Services

Community-Referenced Vocational Curricula and Community-Based Vocational Service Delivery are Components of a Model Which:

1.1 reflects vocational skills derived from an on-going analysis of the local job market

1.2 provides vocational training in natural environments during natural times of the day

1.3 focuses on functional activities (instead of splinter skills) that are required to participate in integrated adult environments

1.4 is individualized to the needs of specific students and specific communities

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Employment Oriented Vocational Skills Training

Goal 2

Table II.2

Rationale for Community-Based Vocational Skills Training

2.1 Increased opportunities for interaction with non-disabled peers

2.2 Increased perceptions by family, educators, adult service providers, and community of the capabilities of students with disabilities

2.3 Increased opportunities for specific skill acquisition, skill maintenance, and skill generalization

2.4 Increased opportunities to practice and refine skills in natural job settings under realistic job conditions

2.5 Increased opportunities for students and service providers to experience a variety of vocational experiences from which a specific job placement may be chosen

Adapted from Stierer (1986).

Employment Oriented Vocational Skills Training

Goal 2

Table II.3

Overview of Vocational Training Sites for Students with Moderate and Severe Disabilities

LEAST DESIRABLE ↑

3.1 simulated training of vocational skills in the classroom

3.2 simulated training of vocational skills in the school building or in the vocational technical center

3.3 time-limited exposure to selected vocational skills for pairs or small groups of students in community-based vocational training sites

3.4 intensive individualized vocational skill instruction for a specific job type in a community-based training site for an extensive but time-limited period

3.5 job placement, job site training, and support provided BEFORE the student exits the secondary program

↓ MOST DESIRABLE

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Employment Oriented Vocational Skills Training

Goal 2

Table II.4

Steps in Establishing Community-Based Vocational Training Sites

4.1 Establish a task force for planning and implementation.

4.2 Conduct a follow-up survey of past graduates of the secondary program to determine: 1) how many graduates are working; 2) what types of jobs they have found; and 3) what factors have helped them be successful and what factors have served as barriers.

4.3 Establish a philosophical commitment to implementing a community-based service delivery model. Define the mission.

4.4 Outline the program's goals and objectives for community-based training. Write a school policy for the model.

4.5 Identify target age and/or population.

4.6 Conduct a community job market screening of job types and available positions.

4.7 List potential training sites based on the community job market screening.

4.8 Initially contact employers at potential training sites by phone to set up a visit.

4.9 Visit potential sites and determine the job skills required.

4.10 Determine if the site reflects job skills required in other potential employment positions within the community.

4.11 If yes, negotiate with the employer to use the site for training.

4.12 Establish a written training agreement with the employer/student/parents.

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Goal 2

Activity II.1

Assessing A Potential Vocational Training Site in the Community

Purpose of the Activity: to enable participants to demonstrate competence in assessing potential vocational training sites in the community

Target Audience: school professionals (up to 20) in groups of two-three each

Length of Time Require for Activity: 60-90 minutes (varies according to transportation time to and from sites)

Materials:
. The trainer(s) must have contacted an employer or local business for each pair of participants to visit and verified their opportunity to briefly interview the employer and observe one or more workers on the job site
. Training Site Analysis form for each participant
. Pencils/Pens

Summary of Activity:

* Send pairs of participants to pre-contacted community-sites to interview an employer and observe workers on the job

* Instruct the participants to observe one or more worker performing one or more jobs and complete as much information on the training site analysis form as possible. Allow 45-60 minutes to complete

* When all participants have returned, spend 15-20 minutes discussing the activity: 1) What types of jobs were observed? 2) How receptive was the employer? What, if anything, was she or he concerned about? 3) What kinds of skills did the observed job require? 4) How frequent is the turnover for the job? 5) What, if any, of the skills required for this job are being taught in local middle or secondary vocational curricula? 6) Is this a potential job for a person with a moderate or severe disability?

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Employment Oriented Vocational Skills Training

Goal 2

Activity II.1

Vocational Training Site Analysis Form

Business/Employer: ______________________________

Contact: ______________________ Phone Number: ____________________

Address: ______________________________

on bus route: ______________________

Job(s) observed: ______________________________

Entry-level: ______________ Frequency of turnover: ______________

I. Brief description of job: ______________________________

____

____

____

____

II. Physical requirements of job:

mobility: ______________________________

reach: ______________________________

lifting/carrying: ______________________________

one hand/two hand: ______________________________

endurance/stamina: ______________________________

speed: ______________________________

III. Communication requirements

1. Must talk with strangers: yes/no Specifics: ______________

____

2. Must talk with co-workers only: yes/no Specifics: ____________

____

3. Must use telephone: yes/no Specifics: ______________________

____

4. Must follow simple instructions: yes/no Specifics: __________

____

5. Must follow complex instructions: yes/no Specifics: __________

____

IV. Academic requirements:

1. Reading required: yes/no Specifics: _________________________

____

2. Writing/Typing skills: yes/no Specifics: ____________________

____

3. Perceptual skills required: yes/no Specifics: _______________

____

4. Visual acuity required: yes/no Specifics: ___________________

____

5. Hearing acuity required: yes/no Specifics: __________________

____

6. Time management skills required: yes/no Specifics: __________

____

V. Brief description of social climate in work environment (check all that apply):

____ Friendly, cheerful
____ Busy, relaxed
____ Slow, relaxed
____ Structured, orderly

____ Aloof, indifferent
____ Busy, stressful
____ Slow, stressful
____ Unstructured, disorderly

Other:____

____

Type of dress required:

VI. Equipment or materials required:

VII. Appropriateness as community-training site:

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The concept of community-based training is primarily a service delivery issue which requires a trainer to address issues and strategies such as those outlined in Table II.5A. An effective trainer must not only be able to raise issues and potential barriers to the development of a community-referenced and community-based vocational skills model, but must also be able to present strategies for overcoming issues in order to remove barriers and implement the model in participants' local school programs (see Table II.5B). The identification of potential barriers to this model and strategies for addressing these barriers may be presented briefly during an initial workshop where participants are asked to identify barriers and then "told" what strategies have been used successfully by other programs OR they may be addressed in a full day or longer technical assistance workshop where participants are actively involved in identifying local barriers and local strategies. The results of a pre-training needs assessment, as described in Section I, should enable a trainer to determine what the participants' immediate needs are and to design his or her training to meet these identified needs. An effective trainer must accept responsibility for providing content to trainees AND for assuring the integration of content into local programs.

Employment Oriented Vocational Skills Training

Goal 2

Table II.5A

Critical Issues Related to Community-Based Service Delivery

5.1 Transportation

5.2 Insurance coverage for non-school based instruction

5.3 Administrative policies regarding community-based training

5.4 Staff competencies and support

5.5 Funding and related costs

5.6 Staff and parent reactions to curricular changes

5.7 Staff and parent reactions to service delivery changes

5.8 Overtime and compensation time issues for staff

5.9 Scheduling of students and staff

5.10 Evaluation and monitoring of student outcomes

Adapted from Baumgart and VanWalleghem (1986); and Stierer (1986)

Employment Oriented Vocational Skills Training

Goal 2

Table II.5B

Strategies Related to Community-Based Service Delivery

5.1 Transportation

- use of parents (reimburse for mileage)
- utilization of training stations within a short (walking) distance of the school
- utilization of volunteers (reimburse for mileage)
- coordination of regular bus schedules with community training
- use of public transit systems (i.e., bus, taxi, subway, train, etc.)
- teacher transport (reimburse for mileage)
- use of school district vehicles (i.e., vans, cars, drivers' education cars)

5.2 Insurance coverage for non-school instruction

- district liability insurance policies cover teachers and students while in the community
- insurance for students through school accident funds or employer's insurance coverage
- purchase of 24-hour coverage offered to families for a minimal fee at the beginning of school year
- worker's compensation insurance (for students being paid a wage)
- written training agreements between student, parent(s), teacher, and participating employer
- volunteers register with school system volunteer program for insurance coverage

5.3 Administrative policies regarding community-based training

- board of education district-wide policy development
- specific school and/or student agreements

5.4 Funding and related costs

- include money for community-based instruction in annual budgets
- use of individual classroom instructional supplies budget
- use of career education monies
- use of vocational education monies
- use of funds allotted per class by the student government of the school
- establish open purchase order accounts with local merchants

-use of donations from local business for specific uses (e.g., bus passes for transportation training)
-structure purchasing training around regular family purchases using the family supply list and funds

5.5 Scheduling of students and staff

-use of computer-assisted instruction
-use of computer-managed instruction
-team teaching
-use of volunteers
-use of paraprofessionals
-use of peer tutors
-use of university graduate students, student teachers, and practicum students
-teacher-student ratio of 1:4 or less
-heterogeneous grouping of students
-staggered student training schedules
-support personnel providing integrated therapy services

Adapted from Baumgart and Van Walleghem (1986)

Goal 3: Methods of Systematic Instruction

Systematic instruction is characterized by a variety of consistent, replicable, and behavioral procedures which, when combined with appropriate curricula, enhance a student's chances of learning. Systematic instructional techniques have been used successfully with students with moderate and severe disabilities at all ages and during all instructional activities (Snell, 1985). Community-based vocational training (as well as post-placement job site training, Section VII) is just one curricular area in which systematic instruction procedures should be utilized.

An effective trainer must be able to define systematic instruction (Table III.1); present a rationale for its use in community-based training (Table III.2); describe the guidelines and procedures most often associated with it (Tables III.3-III.7); and train participants in the use of systematic instructional procedures (Activity III.1). For parents and some adult service providers, an understanding of the need for systematic procedures with youth with moderate and severe disabilities will enhance their understanding of an educator's role in the preparation of students. For special educators and vocational special needs educators, an in-depth understanding of the procedures and demonstrated ability to implement the procedures will be needed. This may be best provided in a full day workshop followed by one or more technical assistance visits.

A trainer's decision to present either an overview of systematic instruction or an in-depth "how to" workshop must be based on the assessed needs of the trainees: Will they be responsible for providing or supervising vocational instruction OR will they be responsible for assessing and evaluating employment oriented vocational training programs?

Employment Oriented Vocational Skills Training

Goal 3

Table III.1

Definition of Systematic Instruction

Systematic Instruction is characterized by a variety of

- consistent
- replicable

  and
- behavioral

procedures that enhance a student with moderate or severe disabilities' chances of learning and maintaining a variety of skills

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Employment Oriented Vocational Skill Training

Goal 3

Table III.2

Rationale for Use of Systematic Instruction in Community-Based Vocational Training

2.1 Provides a format for insuring the delivery of consistent instructional strategies across teachers, sites, and students

2.2 Provides a format for monitoring the acquisition of new job skills and maintenance of acquired job skills

2.3 Provides an objective measure of the student's independent performance of job skills

2.4 Provides a format for individualized training programs for all students including the most efficient and least intrusive use of prompts and training time

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Employment Oriented Vocational Skills Training

Goal 3

Table III.3

Components of Systematic Instruction in Community-Based Vocational Training

3.1 Conduct a thorough and on-going analysis of the community to identify vocational opportunities and associated skills.

3.2 Develop task analyses and set training goals through baseline and probe procedures.

3.4 Identify appropriate reinforcers for individual students to increase work skills and determine schedule of reinforcement.

3.5 Identify least-to-most intrusive prompting procedures to be used consistently during vocational training.

3.6 Conduct on-going assessment of the student's skill acquisition through regular probes and collection of training data.

3.7 Evaluate student's progress through examination of probe and training data.

3.8 Modify teaching procedures, skills being trained, or environment training is taking place in based upon the collected data.

3.9 Assure systematic fading of intensity and frequency of prompts including thinning of reinforcement.

3.10 Assure maintenance of skill over time once acquisition has been met through regular probing.

3.11 Assess production rate and quality of skill performance--If skill was task analyzed appropriately and trained systematically, production and quality should not be critical issues.

3.12 Attend to related vocational skills by infusing them in the vocational training process rather than by treating them as prerequisites to vocational training.

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Goal 3

Table III.4

Developing and Using Task Analyses in Vocational Training Sites

4.1 Inventory the entire job through an initial training site analysis.

4.2 Identify specific tasks needed to complete the targeted job.

4.3 Observe and perform each specific task selected for training.

4.4 Develop a task analysis for each task selected for training by defining the step-by step process (set of behaviors) the individual must go through to complete the task from beginning to end.

4.5 "Field Test" or validate each task analysis.

4.6 Revise each task analysis as needed.

4.7 Set a performance criterion for each task analysis.

4.8 Using the task analysis, baseline the individual's performance of the entire task.

4.9 Using the task analysis, provide acquisition training for the entire task.

4.10 Using the task analysis, probe or test the individual's performance of the entire task on a regular basis.

4.11 Using the task analysis, continue to provide acquisition training until the individual meets the performance criterion.

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Goal 3

Table III.5

Types of Reinforcers for Use During Community-Based Vocational Training

5.1 social praise (e.g., from teacher, supervisor, coworker, or family)

5.2 additional break time (until endurance is increased)

5.3 money (paycheck, daily money for break)

5.4 lunch at a local restaurant or other community activity

5.5 social interaction with coworkers

5.6 purchase of individual items with earned wages (records, clothes, favorite foods, etc.)

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Goal 3

Table III.6

Choosing and Using Prompts in Vocational Training Sites

6.1 What prompts are the least intrusive?

6.2 What prompts will be most easily faded?

6.3 What prompts are the least stigmatizing?

6.4 What prompts are the most practical in community-based settings?

6.5 How are these considerations affected by individual students' learning modalities?

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Table III.7

Managing Inappropriate Behavior in a Vocational Training Site

7.1 Carefully define the target behavior: What does it look like? How long does it last? When does it occur? What happens immediately before and immediately after the behavior?

7.2 Measure the frequency or duration of the target behavior over a period of days: Is it really an inappropriate behavior? Does it happen often enough or last long enough to really be considered a problem? How do teachers, students, or other involved people react to the behavior?

7.3 Identify an alternative behavior that is already occuring at low levels and/or is incompatable with the target behavior. What would you like the student to do instead of the target behavior?

7.4 Ignore the target behavior completely while consistently reinforcing the alternate behavior.

7.5 Measure the frequency or duration of the target behavior while setting small criterion for reducing it.

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Goal 3

Table III.8

Acquisition Guidelines

BASELINE/PROBES are procedures used to determine to what extent a student is able to perform a task BEFORE any training takes place. It is important to withhold ALL prompting and reinforcement SPECIFIC to the task during these procedures in order to obtain an accurate picture of what the person is able to do INDEPENDENTLY before training begins.

8.1 Have student sit/stand positioned for work. Teacher should explain that she/he will be asking the student to perform without help some skills which the student may not be familiar with. Teacher should also explain that she/he will be taking data to provide information to help train the student later.

8.2 Teacher may or may not silently demonstrate the entire task. (This is based on teacher preference, complexity of skill, and learning rate of students, but should be consistent across students and teachers).

8.3 Teacher should verbally request the student to perform the skill. S/he should give no verbal, gestural, model, or physical prompting, or reinforcement specific to the skill. Teacher may, however, verbally reinforce working hard and/or paying attention.

8.4 Score task analysis data sheet with a plus (+) for each correct step. Score a minus (-) for each incorrect response or if the student makes no response within a given latency. There are two methods of gathering baseline data: 1) discontinue baseline at the first error or when the student makes no response within the given latency. In this method, record all correct steps as plus (+) and all subsequent steps as minus (-). or 2) allow the student a set amount of time (e.g., 3 minutes) to complete the entire task and record all sequence of steps or length of time spent on one step. (Either method may be used based on teacher preference, but should be consistent across students and teachers).

8.5 To determine the percentage of steps performed correctly, divide the total number of pluses by the total number of steps in the task analysis, then multiply by 100.

$$\frac{\text{total \# of +'s}}{\text{total \# of steps}} \times 100 = \text{\% of task performed correctly}$$

8.6 Graph the results.

8.7 Whenever possible, repeat baseline procedures for at least 3 days or until a stable baseline is obtained.

8.8 After a stable baseline is obtained, begin training using systematic prompting procedures in a least to most intrusive hierarchy. Allow the student a given latency to perform each step independently. Intervene with the least intrusive prompt if the student makes an error or is unable to complete the step completely. If the student is still unable to complete the step, intervene with the next least intrusive prompt to ensure successful completion of the step. An example of a least to most intrusive prompt hierarch would be: gestural-verbal-model-physical. (Hierarchy of prompts should be determined based on trainer preference, learning modalities of the students, and complexity of the skill, but should be consistent across students and teachers). Continue this process for each step of the task analysis.

8.9 Prior to the daily instructional period (or once a week), collect a non-prompted, non-reinforced probe. Use the same guidelines as during baseline, and collect and graph data. (This allows the teacher to see what the student can do independently, from what has been taught, not what can be done given teacher prompts).

8.10 Continue daily training of the student until s/he has shown true acquisition of the skill by meeting the pre-determined behavioral objective. (e.g., Given a rack of clean dishes the student will sort and stack the dishes with 100% accuracy according to the task analysis for 3 consecutive days during probe conditions).

Adapted from Pietruski, Everson, Goodwyn and Wehman, 1985

Employment Oriented Vocational Skills Training

Goal 3

Activity III.1

Sample Activities to Demonstrate Competence in the Use of Systematic Instruction on Vocational Training Sites

Purpose of the Activities: to assist trainees in understanding and using systematic instructional procedures in community-based vocational sites.

Target Audience: direct service professionals and supervisors (e.g., special education teachers, vocational special needs teachers, supported employment specialists or job coaches, etc.) Up to 15 people working in groups of 2-3 persons

Length of Time Required for Activities: maximum of 2 1/2 hours (not including transportation time to and from sites)

Materials/Students:

- pre-identified and pre-contacted job sites for observation
- 3 students from a secondary program who have agreed to participate (consider paying them for their participation)
- task analysis forms/pencils for each participants

Summary of Activities:

* BEFORE BRINGING STUDENTS TO TRAINING SITE, allow 45-60 minutes for trainees to observe employees and write task analyses of the entire job or small sections of the job. (For example, loading a dish machine would be one task analysis, unloading a dish machine would be another task analysis). Breaking one or two jobs into smaller task will enable participants to more easily complete an accurate task analysis.

* After observing employees, write task analysis; revise; "field test" it while again observing the employees; and revise again.

* Use task analysis to baseline the student's ability to complete the job skill.

* Use task analysis to systematically train student on the job. SPEND A MINIMUM OF 45 MINUTES TRAINING. Encourage trainees to: practice prompting, collect data, assess need for revising task analysis for the individual student, socially reinforce students.

* After activity, spend 15-30 minutes discussing the results. Discuss: How should a probe be explained to a student? How difficult is it to collect probe data? Training data? How difficult is it to use a system of least to most intrusive prompts? Is this prompting system appropriate for every student? What natural movements did the student make that made it necessary to revise the task analysis? How can behavior problems be addressed?

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Goal 4: Procedures for Implementing Change in Existing School Programs

An effective trainer must not only present information on appropriate vocational training programs to trainees, but he or she must also assist local school personnel in assessing their school sponsored vocational programs and in implementing changes in the programs. Trainers must assess participants' understanding of the characteristics of appropriate vocational curricula for students with moderate and severe disabilities and the system's readiness to change BEFORE addressing procedures for implementing change. (See Sections I and II)

Participants may need one or more intensive workshops on the material covered in Goals 1-3 followed by a full day workshop on material covered in Goal 4. Other participants may simply need a brief review of curricula characteristics before actively participating in problem solving with their local school programs. An effective trainer must be able to quickly assess his or her audience's knowledge and readiness to change in order to select the most appropriate training material from this section.

Guidelines for beginning the change process are suggested in Tables IV.1-IV.2, but more specific strategies must be developed based upon the system's unique needs. The trainer is encouraged to read Baumgart and Van Walleghem (1986) for more specific guidelines.

Employment Oriented Vocational Skills Training

Goal 4

Table IV.1

Characteristics of Local Task Forces for Implementing Change in School Programs

1.1 Representatives of all school personnel (administrative and direct services) and parent advocates agree to serve on task force

1.2 Members believe that adults with disabilities have the right to work and earn wages in the community

1.3 Members believe that the concept of "readiness" is unnecessary

1.4 Members focus on ability instead of disability

1.5 Members focus on services instead of buildings

1.6 Members believe success is related to the best training in the best environments

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Employment Oriented Vocational Skills Training

Goal 4

Table IV.2

Issues for Local Task Forces in Implementing Change in School Programs

2.1 Redirection of funds/establishment of petty cash fund

2.2 Parental/student concerns about curricula changes

2.3 Staff concerns about service delivery changes

2.4 Personnel policies on flexible time for staff

2.5 Lack of staff training in implementation of new service delivery model

2.6 Perception by staff/parents of sheltered workshop/day activity programs

2.7 Availability of data and information on new service delivery outcomes. Review the outcome data on students who have left the school system to assess post-secondary vocational needs. (This may help school staff realize the need for change based on where students have gone after leaving school).

2.8 Interdisciplinary coordination--specification of actual agencies involved in the transition process

2.9 Philosophy of old services versus philosophy of new services--statement of philosophy and goals of "new" services.

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References and Resources

for Employment Oriented Vocational Skills Training

The following references and resources may be useful to staff trainers in increasing their knowledge of community-based vocational training for students with moderate and severe disabilities. Several of the resources listed below also contain sample training materials and activities which may be combined with the sample materials in this manual and adapted to the needs of individual trainers and their targeted participants.

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Section VI

Interagency Transition Planning Training

By

Jane M. Everson

Mike Barcus Sherril Moon

M. V. Morton

Interagency Transition Planning Training

▶ What is Interagency Transition Planning?

Interagency transition planning is the process of planning and assuring optimal adult outcomes for youth with disabilities as they leave special education programs. Transition planning is an interagency process that begins in the early years of a student's secondary school program and includes input from the student and his or her family as well as input from special and vocational special needs educators, and adult service providers who have been targeted to provide services for the student once he or she leaves the school system. The goals of interagency transition planning are to avoid interruption of needed services, avoid duplication of services, and to identify meaningful adult outcomes in the areas of employment, community living, and leisure/recreation. Transition planning is the bridge between a strong educational foundation and meaningful adult outcomes (Wehman, Kregel, & Barcus, 1985; Will, 1984).

Who Should be Targeted for Training?

Transition planning which results in meaningful adult outcomes for youth with moderate and severe disabilities must by definition involve professionals from education as well as relevant adult service agencies and providers and parents. Although many professionals, agencies, and parents are beginning to recognize the need for formal transition from school to work planning, the need for inservice training to interagency teams and interdisciplinary teams of professionals and parents is still pressing. Inservice training on issues related to interagency transition planning must provide cross-agency and cross-disciplinary training to special educators, vocational special needs educators, school guidance counselors, vocational rehabilitation professionals, mental health/mental retardation professionals, social workers, other adult service providers, as well as state and local policy makers, and parents. Perhaps more than in any other inservice training area related to individuals with disabilities, the need to train teams of interagency and interdisciplinary participants is critical.

What is the Role of the Trainer?

The role of the trainer is to provide participants with information in five broad areas: 1) the current definitions of transition; 2) the federal and state policy and legislative emphasis on transition; 3) the roles of professionals and parents in the transition process; 4) individualization of the transition process; and 5) implementation of interagency transition planning at a local community level.

Whenever possible, the trainer should have participants identify and prioritize their training needs within these five training areas prior to the development and delivery of inservice training. As described in detail in Section I, this may be accomplished prior to the first day of training through a formal questionnaire or for more experienced (and flexible) trainers through an opening activity during the first hour of training. This is a critical role for the trainer to assume because it provides the trainer with information not only on the participants' needs, but also with preliminary information on the skills held by the participants. The trainer must be able to provide participants with information related to each of the five areas above and be able to effectively work with teams of parents and professionals to overcome issues of territoriality and competition as well as communication barriers. As described in Section II, interdisciplinary and interagency team building is an important component of transition planning.

During the provision of interagency transition planning training, the trainer must assume two roles: 1) as a trainer skilled in the delivery of specific content; and 2) as a trainer skilled in helping participants identify issues and strategies related to implementing transition planning in local communities.

▶ What are the Trainer's Goals and Objectives of Interagency Transition Planning?

Goals and Objectives

It is the role of the trainer to present information and to facilitate activities and discussions which accomplish objectives under each of the five identified training goals:

Goal 1: Historical Overview of Transition:

Objective 1.1 to describe and differentiate between the characteristics and assumptions of current transition from school to adult life models for youth with moderate and severe disabilities

Objective 1.2 to define the goal(s) of vocational transition and relate them to the concepts of community-based vocational training and supported competitive employment outcomes

Goal 2: Federal and State Legislative and Funding Emphasis on Transition:

Objective 2.1 to describe the strengths and limitations of:

a) OSERS priority on Transition
b) OSERS priority on Supported Employment
c) Developmental Disabilities Act of 1984
d) Rehabilitation Act Amendments of 1986
f) Education of the Handicapped Act Amendments of 1983 and 1986
g) Selected legislation and state task force summaries on transition planning at various state levels (e.g., Florida, Indiana, Kansas, Illinois, Massachusetts)

Goal 3: Roles of Professionals and Parents in an Interagency Transition Process:

Objective 3.1 to describe the roles of professionals and parents in an interagency systems change process of transition planning

Objective 3.2 to describe the roles of professionals and parents in individualizing the transition process for specific students

Objective 3.3 to identify the potential barriers inherent in interdisciplinary teams

Objective 3.4 to present strategies for addressing barriers to effective interagency and interdisciplanry team efforts

Goal 4: Individualization of the Transition Process:

Objective 4.1 to describe the step by step process of individualizing the transition process for a specific student

Objective 4.2 to describe procedures for developing an individual transition plan (ITP) for a specific student

Objective 4.3 to describe procedures for evaluating and monitoring individual student transition outcomes

Goal 5: Implementing Interagency Transition Planning at a Local Community Level:

Objective 5.1 to describe the need for local interagency core teams or task forces to plan transition

Objective 5.2 to describe a variety of local systems change procedures useful in transition planning:

a) needs assessments
b) local action plans
c) local interagency agreements

Objective 5.3 to present methods of monitoring and evaluating local transition planning and outcomes.

Sample Training Activities and Materials for Use During Interagency Transition Planning Training

The purpose of this section is not to present a step-by-step outline of activities and accompanying narration and materials for trainers to use to cover the goals and objectives in Section VI, but instead to present a sample of activities and materials which trainers may use to develop and expand upon their own ideas. Based on the guidelines for inservice training discussed in Sections I-IV, it is expected that trainers will wish to adapt the following activities and materials based upon their own values and experiences, and upon the values and experiences of their targeted audiences.

Interagency transition planning is the bridge between a strong community-based vocational training foundation and paid employment outcomes for young adults with moderate and severe disabilities (Wehman et al., 1985; Will, 1984). It is recommended that trainers spend time discussing transition both as a local systems change process and as a process of individualizing transition planning for specific students (McCarthy, Everson, Inge, and Barcus, 1985).

Selection of the most appropriate content and activities from this section should be based on guidelines presented in Sections I-IV: 1) overall training time; 2) immediate needs of the trainees; 3) existing knowledge base of the trainees; and 4) agency and discipline make-up of the targeted trainees.

Goal 1: Historical Overview of Transition

In order to understand why transition is currently receiving so much emphasis in professional literature, conferences, and in university training programs, as well as in state legislative bodies, a skilled trainer needs to briefly review how transition has evolved over the past four years. Although it is not intended to be comprehensive, Table I.1 summarizes typical existing transition literature and manuals. The earliest transition literature and manuals, from about 1984 through about 1985 focused on the presentation of philosophical models for transition planning (e.g., Brown, 1984; Halpern, 1985; Wehman et al., 1985; Will, 1984). These models were untested ideas which provided a framework for service providers to work within. This early literature encouraged the writing of transition implementation manuals and articles on writing individual transition plans (ITPs) and coordinating interagency services (e.g., Horton, Maddox and Edgar, 1984; Lambrou et al., 1986; McCarthy et al., 1985; McDonnell and Hardman, 1985). Most recently, but still limited in number, transition literature has begun to present case studies with both data-based and qualitative evaluations of the effectiveness of transition (e.g., Freagon et al., unpublished manuscript; Wehman et al., unpublished manuscript). Tables I.2 - I.8 summarize some of the current definitions of transition, the proposed models, and some common characteristics of current transition models.

Activity I.1 is a sample of an activity which trainers may use as an opening activity to encourage small group discussions or as a summary activity to conclude the introduction to transition.

Interagency Transition Planning Training

Goal 1

Table I.1

Current Transition Literature

1.1 Transition Models

- Brown (1984)
- Halpern (1985)
- Wehman, Kregel and Barcus (1985)
- Will (1984)

1.2 Transition Procedures and Implementation Manuals

- Hawaii Transition Project, (1986)
- Horton, Maddox and Edgar (1984)
- Lambrou et al. (1986)
- McCarthy, Everson, Inge and Barcus (1985)
- McDonnell and Hardman (1985)
- McDonnell, Sheehan and Wilcox (unpublished manuscript)
- Vermont Association for Retarded Citizens (1985)

1.3 Case studies and Data-Based Evaluation of Effectiveness of Transition Planning

- Freagon, Ahlgrens, Smith, Costello and Peters (unpublished manuscript)
- Wehman, Wood-Pietruski, Everson and Parent (1985)
- Wehman et al. (unpublished manuscript)

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Interagency Transition Planning Training

Goal 1

Table 1.2

OSERS Definition of Transition

Will (1984)

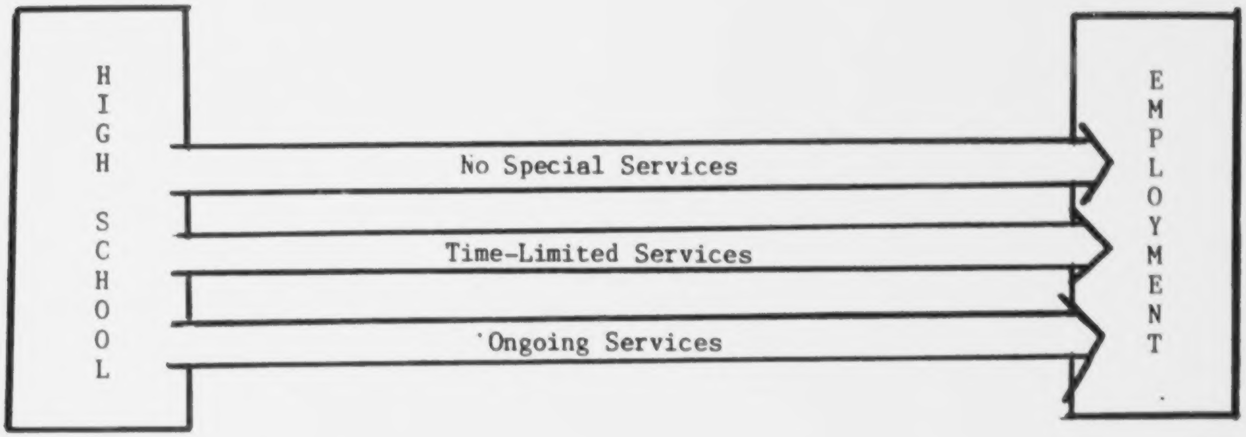
Transition from school to working life is an outcome-oriented process encompassing a broad array of services and experiences that lead to employment. Transition is a period that includes high school, the point of graduation, additional post-secondary education or adult services, and the initial years in employment. Transition is a bridge between the security and structure offered by the school and the opportunities and risks of adult life.

Interagency Transition Planning Training

Goal 1

Table 1.3

OSERS Transition Model


HIGH SCHOOL
No Special Services
Time-Limited Services
Ongoing Services
EMPLOYMENT

Interagency Transition Planning Training

Goal 1

Table I.4

Wehman, Kregel and Barcus (1985)

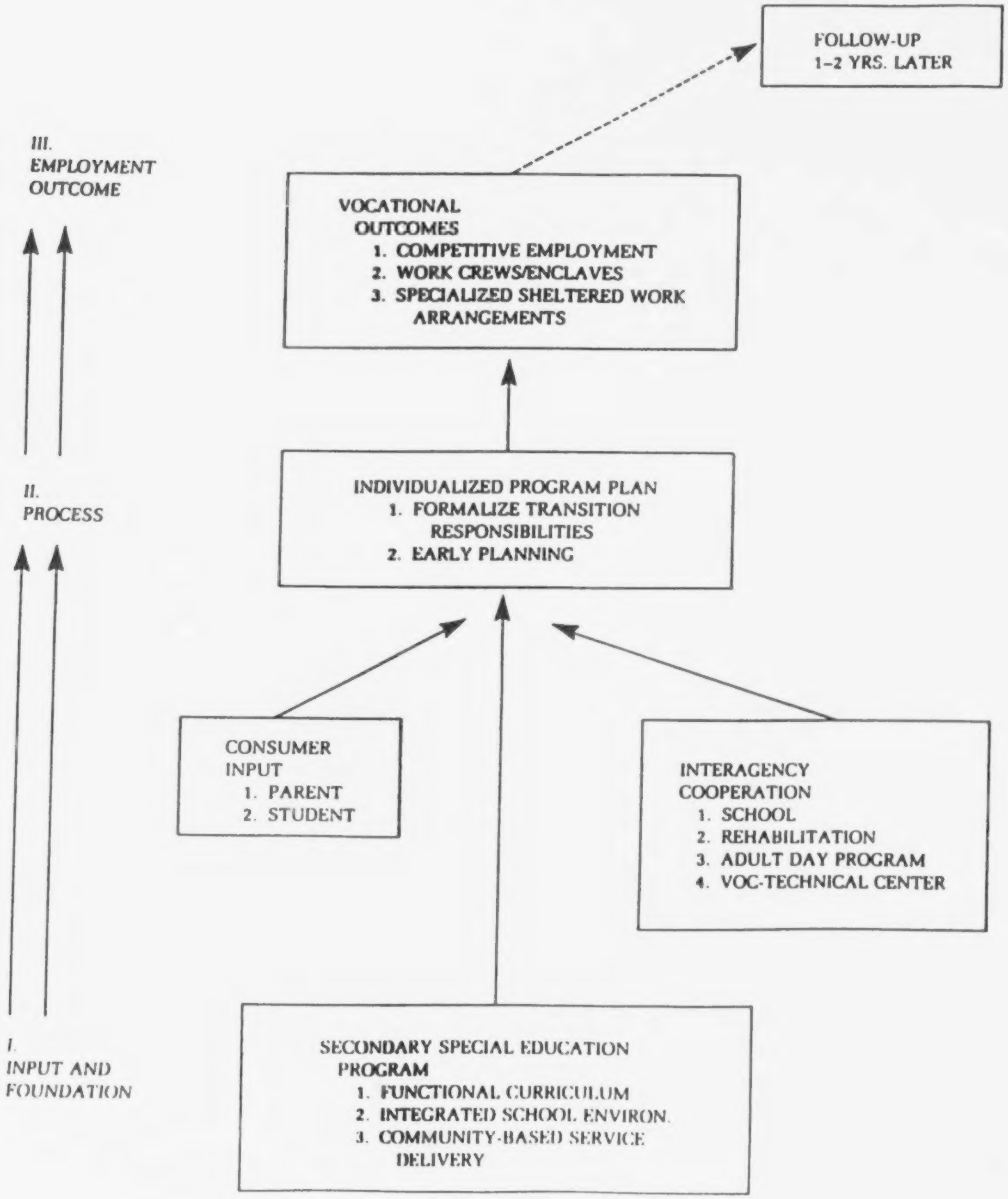
Vocational transition is a carefully planned process which may be initiated either by school personnel or adult service providers, to establish and implement a plan for either employment or additional vocational training of a student with a handicap who will graduate or leave school in three to five years; such a process must involve special educators, vocational educators, parents and/or the student, an adult service system representative and possibly an employer.

Interagency Transition Planning Training

Goal 1

Table I.5

Wehman, Kregel and Barcus (1985) Transition Model

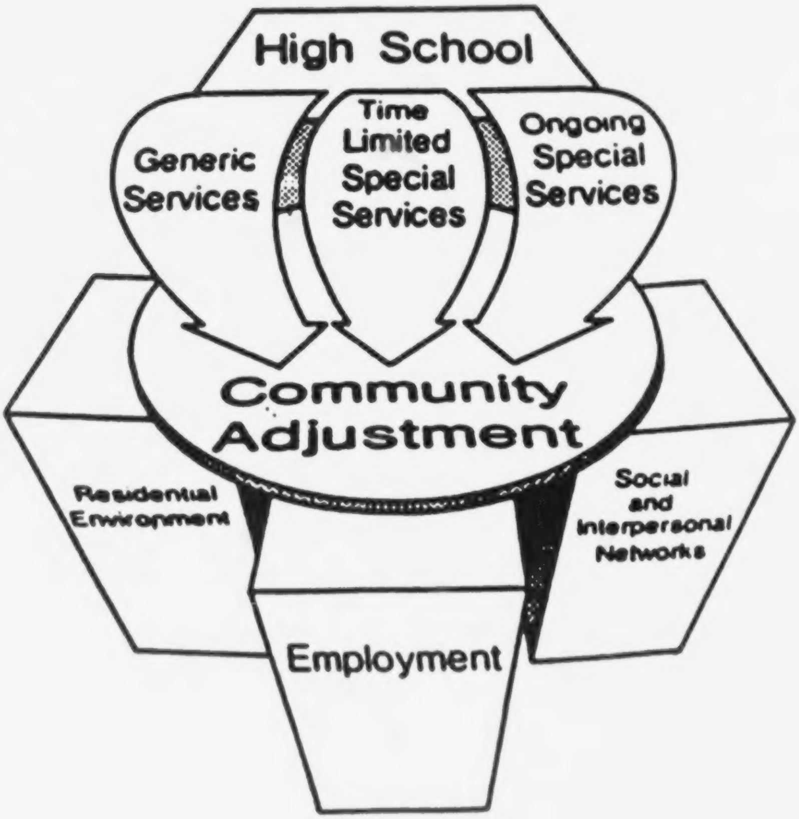

FOLLOW-UP
1-2 YRS. LATER
III.
EMPLOYMENT
OUTCOME
VOCATIONAL
OUTCOMES
1. COMPETITIVE EMPLOYMENT
2. WORK CREWS/ENCLAVES
3. SPECIALIZED SHELTERED WORK
ARRANGEMENTS
II.
PROCESS
INDIVIDUALIZED PROGRAM PLAN
1. FORMALIZE TRANSITION
RESPONSIBILITIES
2. EARLY PLANNING
CONSUMER
INPUT
1. PARENT
2. STUDENT
INTERAGENCY
COOPERATION
1. SCHOOL
2. REHABILITATION
3. ADULT DAY PROGRAM
4. VOC-TECHNICAL CENTER
I.
INPUT AND
FOUNDATION
SECONDARY SPECIAL EDUCATION
PROGRAM
1. FUNCTIONAL CURRICULUM
2. INTEGRATED SCHOOL ENVIRON.
3. COMMUNITY-BASED SERVICE
DELIVERY

Interagency Transition Planning Training

Goal 1

Table I.6

Halpern's Revised Transition Model (1985)


High School
Generic Services
Time Limited Special Services
Ongoing Special Services
Community Adjustment
Residential Environment
Social and Interpersonal Networks
Employment

Interagency Transition Planning Training

Goal 1

Table I.7

Wehman, Moon, Everson, Wood and Barcus Definition of Transition (1987)

Transition is an interagency planning and implementation process which takes place at the local level and results in new and different outcomes for youth with disabilities. Effective transition planning and implementation is more that the development of ITPs; it is also an evaluation of local programs and services and a coordinated and cooperative effort by all involved agencies to bring about systems change.

Interagency Transition Planning Training

Goal 1

Table I.8

Characteristics of Current Transition Models

8.1 Procedures and guidelines are specific to one community or to a limited number of communities in one state

8.2 Full participation of all school and adult service providers, parents, and students is limited

8.3 Procedures and guidelines, for the most part, transition students from existing secondary programs into existing adult options regardless of whether this is the most effective transition possible for the student

8.4 Minimal outcome and evaluation data are collected to support effectiveness and benefits of transition planning

Project Transition Into Employment
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Interagency Transition Planning Training

Goal 1

Activity I.1

Transition is . . .

Purpose of the Activity: to assist participants in assessing transition planning as it currently exists in their community or state.

Target Audience: Professionals and parents (up to 50 individuals in groups of 5 each)

Length of Time Required for Activity: 15-20 minutes

Materials:
- Flip chart with marker or
- Transparency with markers, overhead projector

Summary of Activity: Ask each group to spend 5 minutes discussing transition in their community (or state). How many communities are actively implementing transition procedures? How many agencies are actively involved? What students have been targeted? How many are obtaining employment? What other changes in outcomes have been achieved? After groups have discussed transition efforts in their community (or state), have them spend another 2-3 minutes choosing one word which best describes current transition efforts in their community (or state). Ask each group to share their one word on the flip chart or transparency. Close the activity by discussing the one word descriptions chosen. Are groups generally satisfied or dissatisfied with current transition efforts? Are the descriptive words chosen reflective of positive feelings about transition or are participants feeling frustrated about transition efforts?

Goal 2: Federal and State Legislative and Funding Emphasis on Transition

One of the major reasons that transition is currently receiving so much emphasis nationally is the recent federal and state level support given to the concept. The Education of the Handicapped Act's 1983 amendments (P.L. 98-199) authorized $6,000,000 for fiscal year 1984, $6,330,000 for fiscal year 1985, and $6,600,000 for fiscal year 1986 specifically for transition research, training, and demonstration. This initial federal support along with OSERS' 1984 transition initiative were catalysts for more recent state legislation requiring transition planning along with recent changes in the Developmental Disabilities Act of 1984 (P.L. 98-527), the Carl D. Perkins Vocational Education Act of 1984 (P.L. 98-524) and the reauthorization of the Rehabilitation Act of 1986 (P.L. 99-506). 1986 amendments to the Education of the Handicapped Act (P.L. 99-457) authorized more than seven million dollars each year for transition planning. Tables II.1 - II.2 summarize the major impact of current federal and selected state efforts in the area of transition as of early 1987.

Goal 2

Table II.1

Federal Role in Transition

1.1 Education of the Handicapped Act Amendments of 1983 (P.L. 98-199) Section 626, and 1986 (P.L. 99-457), Section 626

- Promotes secondary education and transition service to handicapped youth ages 12-22
- Authorizes funding for research, training and demonstration in the following areas:
  - development of strategies and techniques for transition from school to independent living
  - establishment of demonstration models emphasizing vocational, transitional, and job placement services
  - provision of demographic studies on number and types of handicapping conditions of students and services required
  - initiation of collaborative models between education agencies and adult service agencies
  - development of procedures for evaluation of programs in the area of transition

1.2 Transition of Youth with Disabilities Priority -- Office of Special Education and Rehabilitative Services, U.S. Department of Education (1984)

- Establishes transition from school to working life for all individuals with disabilities as a national priority
- Maintains that the outcome of education and transition is sustained employment through an array of services:
  - high school foundation offering an integrated, community-based, functional curriculum
  - coordinated efforts among school and adult service providers to assure a smooth transition
  - combination of work options with the support necessary for employment retention

1.3 Supported Employment Initiative -- Office of Special Education and Rehabilitative Services, U.S. Department of Education (1984)

- Defines supported employment by four characteristics:
  - is designed for individuals typically served in day activity programs and who, because of the severity of the disability, are not typically served by vocational rehabilitation
  - involves the ongoing provision of training, supervision, and support services
  - is designed to produce the same benefits received by others and considered to be normal measures of employment quality: i.e., income level, quality of working life
  - incorporates flexibility in support strategies to assist individuals in obtaining and performing work

- Provides funding to assist states in converting traditional day activity programs to alternative supported employment methods

1.4 Carl D. Perkins Vocation Education Act of 1984 (P.L. 98-524)

- Maintains that 10 percent of state's formula grant allotment under part A be used to provide vocational education to handicapped individuals, as additional cost over regular vocational education expenditures
- Mandates that every student with disabilities and his/her parents be informed of vocational education opportunities available in school one year before vocational education services are provided in school or by the ninth grade
- Assures that students with disabilities have equal access to services through vocational education when appropriate, as indicated in the IEP Services may include:
  - vocational assessment
  - special services with adaptation of curriculum to meet needs
  - guidance counseling and career development
  - staff and counseling services to facilitate transition

1.5 Developmental Disabilities Act of 1984 (P.L. 98-527)

- Adds "employment related" activities as a new priority service to administering agency of developmental disabilities funds. This area will be a mandated priority by fiscal year 1987

- Drops non-vocational social developmental services as a priority service
- Provides $10,000 supplement to UAFs for activities related to raising public awareness of employment for persons with developmental disabilities

1.6 Rehabilitation Act of 1986 (P.L. 99-506)

- Provides for supported employment services in all states through a 22 million dollar authorization
- Authorizes supported employment as a viable rehabilitation closure
- Provides new emphasis on rehabilitation engineering

1.7 Employment Opportunities for Disabled Americans Act of 1986 (P.L. 99-643)

- Permanent Authorization of Section 1619A + B of the Social Security Act
- 1619a authorizes cash benefits to be paid to working social security beneficiaries as long as their earnings are below the federal break-even point
- 1619b authorizes the continuation of Medicaid coverage to social security recipients whose earnings, minus medical costs, do not equal the total of SSI/Medicaid benefits.
- Once an individual "earns out" of 1619(b) there will be a 12 month period during which they may automatically move move back into either 1619(a) or (b), depending upon their earnings and medical needs.

Interagency Transition Planning Training

Goal 2

Table II.2

Selected State Efforts in Transition

2.1 Florida

- Project Transition's final report to the state legislative body made 8 recommendations including:
  - the development of a state-wide interagency task force
  - the creation of a State Transition Coordinator
  - the enactment of legislation requiring the development of ITPs.

2.2 Illinois

- Governor's Planning Council on Developmental Disabilities submitted a report to the state legislative body desiring 12 recommendations:
  - develop interagency transition assistance committee (TAC)
  - develop state-wide needs assessment data system
  - develop state-wide post-school follow-up survey
  - public school initiation of transition planning
  - develop local transition planning and coordinating committees (TPCCs)
  - develop state-wide vocational education dissemination campaign
  - provide technical assistance and inservice

- expand involvement of post-secondary agencies
- develop professional and paraprofessional roles and responsibilities
- conduct transition evaluation studies
- identify transition outcome measures
- establish necessary statutes, codes, and interagency agreements to bring about changes

2.3 Kansas

- passed House Bill 2300 in 1986
- mandates transition plans for special education students in two pilot sites in the state

2.4 Massachusetts

- Passed chapter 688 ("Turning 22 Law) in 1983
- mandates transition plan development for students with severe disabilities

2.5 North Carolina

- established state level interagency task force in 1985
- identified and developed a directory of transition models throughout state
- awarded local mini-grants, and provided training, and technical assistance

2.6 Oregon

- conducted two extensive state-wide student follow-up studies
- developed and disseminated four policy documents

- funded 12 local sites to develop model transition programs

2.7 Virginia

- passed House Bill 798 in 1986
- established state-wide Interagency Coordinating Council on Delivery of Related Services to Handicapped Children

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Goal 3: Roles of Professionals and Parents in an Interagency Transition Planning Process

Comprehensive transition from school to work planning and implementation requires participation from all relevant school and adult services providers as well as parents and individuals with disabilities. Very often, comprehensive transition planning requires a restructuring and rethinking of professional roles both at a local level and at an individual transition planning team level (Everson and Moon, 1987). However, redefining professional roles is not enough; participation by young adults and their family members must also be encouraged (Wehman, Moon, Everson, Wood and Barcus, 1987).

Inservice training provided to groups of professionals and parents representing key agencies and parent advocates is an effective mechanism for addressing transition related questions such as:

What do I do?

Why do I do it?

What would I like to be able to do?

Who do I need help from to be able to do things differently?

Effective trainers must be able to raise issues such as these by assisting trainees with: 1) defining their roles as interagency and interdisciplinary team members; 2) identifying barriers to achieving these roles; and 3) identifying strategies for coordinating team efforts.

The material in Tables III.1 - III.7 and Activity III.1 describes some guidelines for defining and facilitating "optimal" roles and responsibilities assumed by professionals and parents in the transition planning process (Everson and Moon, 1987).

Interagency Transition Planning Training

Goal 3

Table III.1

Secondary Education Preparation Responsibilities Which May Be Assumed by Special Educators

Administrative Responsibilities

- Redirect curricula funds for community-based vocational training
- Allow flexibility in teachers' and aides' classroom roles and responsibilities to enable teachers and aides to teach in community-based sites
- Develop written policies and procedures to reflect service delivery changes and to ensure liability coverage for community-based trainig
- Develop guidelines for local follow-up studies of graduates of secondary programs
- Establish a business advisory committee in cooperation with the vocational education administrator to obtain feedback and support from local employers on vocational curricula and community-based job sites

Direct Service Responsibilities

- Identify and analyze community-based vocational training sites and other community sites in the student's local community
- With the assistance of the vocational education teachers and other ITP planning team members, provide students access to two or more community-based vocational training experiences and a variety of other community-based training experiences during the secondary years
- With the assistance of the vocational rehabilitation counselor and vocational educator, collect and analyze vocational assessment data
- Assure "optimal" parent, family, and student involvement throughout the educational preparation process

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.2

Transition Initiation Responsibilities Which May Be Assumed by Special Educators

Administrative Responsibilities

- Establish and participate in a local interagency task force to plan local transition procedures
- With the task force, designate school liason and define guidelines for local and building level transition planning
- Target names of students for transition planning and coordinate transition data management
- Attend ITP planning meetings for individual students
- With the task force, establish local interagency agreements with key agencies and organizations

Direct Service Responsibilities

- Convene (ITP) meetings
- Coordinate the development and implementation of ITPs
- Identify referral needs and assure referrals to appropriate adult services and agencies are made
- Assure "optimal" parent, family, and student participation in the ITP
- Initiate community-based instruction in all curricular domains
- With the ITP team, assist with job placement or post-secondary education for students during their final year of school

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.3

Case Management Responsibilities Which May Be Assumed by Vocational Rehabilitators

Administrative Responsibilities

- Support development of local supported work models
- Develop vendorship and purchase of service agreements with employment and supported employment service providers
- Designate a liason to participate in local transition planning task force
- Provide inservice to school personnel and parents on agency's eligibility determination and service provision
- With local task force, establish local interagency agreements with key agencies and organizations

Direct Service Responsibilities

- Attend ITP meetings of students in final year of secondary program and/or at identified age students are at high risk of dropping out of school
- Serve as a consultant to ITP planning team throughout secondary years
- With ITP team, gather and analyze vocational assessment data for referred students from a variety of sources
- With ITP team, coordinate and monitor the vocational training, job placement, or supported employment placement(s) of post-secondary students
- With ITP team, identify referral needs and assure referral process to appropriate adult services and agencies

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.4

Information and Direct Service Responsibilities Which May Be Assumed by Case Management Agencies and Organizations

Administrative Responsibilities

- Establish and participate in a local interagency task force to plan local transition planning
- Designate agency liason for local transition coordination
- Provide inservice to school personnel and parents on agency or organization's eligibility information and service provision
- Coordinate data management of referral and service needs for local transition age students
- With task force, establish local interagency agreements with key agencies and organization

Direct Service Responsibilities

- Attend ITP meetings of students during their final 2-3 years of school and/or at age students are at high risk of dropping out of school
- With ITP team, share responsibility for assessment of student's needs and referral procedures with other ITP planning team members
- Provide information to the team on available community resources which may be accessed by the family and student (e.g., residential, family support, medical, income support, therapy and counseling, etc.)
- Conduct home visits as needed
- Provide follow-along services once student has been placed in employment and other adult programs

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.5

Occupational Preparation Responsibilities Which May Be Assumed by Vocational Educators

Administrative Responsibilities

- Establish and participate in a local interagency task force to plan local transition planning
- Designate agency liason for local and building level transition planning
- Target names of students for inclusion in secondary vocational education program and coordinate assessment data
- Assure information dissemination on vocational education to parents and students no later than the beginning of the ninth grade
- Establish guidelines for equal access of students receiving special education services in vocational education programs through supplemental staff materials, services, and changes in curricula
- Establish a business advisory committee in cooperation with the special education administrator to obtain feedback and support from local employers on vocational curricula and community-based sites

Direct Service Responsibilities

- Attend the ITP meetings of all students receiving special education services to provide input on appropriate vocational goals
- With the assistance of the special education and vocational rehabilitation counselor, collect and analyze vocational assessment data
- Consult with the ITP team on local employment trends, job outlook, and specific skills required for jobs

- With the assistance of the special education teacher, identify and analyze community-based vocational training sites in the student's local community
- With the assistance of the special education teacher and other ITP planning team members, provide a variety of community-based vocational training experiences to secondary students
- With the ITP team, assist with job placement or post-secondary education for students during their final year of school

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.6

Participant Responsibilities Which May Be Assumed by Parents and Families

- Attend ITP meetings
- Provide input to the ITP team on family's needs and the young adult's needs and the specific responsibilities the family unit is able and willing to assume
- Advocate for the development of an ITP which integrates the young adult into his or her community and decreases his or her dependence on the family and social service systems
- Focus the team's planning on the individual student and family's specific needs
- Request information on residential, recreational, guardianship, financial, medical, social, behavioral, sexual, and other service areas needed or anticipated being needed by the family and young adult
- Provide informal home and community skill training and behavioral intervention which complements the secondary curricula

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Table III.7

Transition Preparation Responsibilities Which May Be Assumed by Educationally Related Services and Medical Services Professionals

Administration Responsibilities

- Establish interagency and interdisciplinary inservice training to professionals and parents
- Establish procedures and policies to assist direct service providers in providing community-based therapy and training
- Provide leadership to task forces in identifying on-going medical, therapeutic and social services for post-secondary youth

Direct Service Responsibilities

- Provide medical, social, therapeutic, and psychological expertise to the ITP team during the transition years
- With the assistance of the other ITP team members, provide assessments and evaluation information related to their individual area of expertise
- As students are placed in community-based sites, assist with training and therapy in the community
- Assist parents and consumers in identifying on-going need for medical, social, and therapeutic services after graduation Assisting with securing referrals and funding for need services
- Conduct home visits as needed

Adapted from Everson and Moon (1987)

Interagency Transition Planning Training

Goal 3

Activity III.1

Defining Roles and Responsibilities

Purpose of the Activity: to apply information on optimal transition roles to transition planning scenarios.

Target Audience: Professionals and parents (up to 50 individuals in groups of 5 each)

Length of Time Required for the Activity: 30-40 minutes

Materials:
- copies of scenarios
- overhead projector, transparency, and marker

Summary of Activity: After lecture on roles and responsibilities and discussion on strategies for using role release (see Section II) to define new roles and responsibilities, divide a large training group into small working groups and pass out a copy of one scenario on the following page to each group.

On a transparency on the overhead projector, with:

---

1. What information do I need?
2. What skills do I need?
3. As a team, what is our strategy for addressing this issue?

Ask each group to spent 5-7 minutes discussing the scenario and brainstorming role release strategies for bringing about change.

At the end of 5-7 minutes, bring the large group back together and ask 3-4 groups to share their scenarios and their answers to the three questions.

Interagency Transition Planning Training

Goal 3

Activity III.1

Scenarios

Scenario 1: An individual transition team made up of: a special education teacher, a 20 year old student with moderate mental retardation, his parents, and the vocational special needs teacher who has assisted the student for the past two years in a food service training program at the local vocational technical center. The parents want the student placed in a job next year instead of returning to school for his final year. Both teachers support this idea, but neither of them feels it is their responsibility to find a specific job placement for the student, nor does either teacher agree about the student's ability to work independently.

Scenario 2: An educational administrator, a vocational rehabilitation administrator, and a mental retardation administrator have agreed to form a task force to explore the development of a local interagency agreement to finalize transition planning in the LEA. After several meetings, they have planned a draft of a document they all agree upon and have gained the support of all three of their agencies. A representative from the local department of the visually handicapped hears about the proposed agreement and is very angry that he hasn't been asked to participate.

Scenario 3: a 15-year old student with cerebral palsy and her parents have requested the IEP/ITP team to develop a plan which includes vocational education for the student. The team, made up of the special education teacher, the occupational and physical therapists, and the reading teacher have not previously considered vocational training as a goal for this student. The therapists feel that the student is not "ready" for employment because of her physical needs.

Goal 4: Individualization of the Transition Process

The step by step process of developing individual transition plans for students with disabilities is a critical component of a comprehensive transition planning and implementation process. Transition plans assist teams in identifying the best adult outcomes for young adults with disabilities as well as the services and the skills they need to achieve and maintain these outcomes. An individual transition plan is a document which is a plan for outcomes and support services instead of a plan for year to year academic skills (Hawaii Transition Project, 1986.) Although there are many similarities to team make-up and step-by-step procedures in developing individual transition plans (ITPs) and to those used in writing individual education programs (IEPs), there are significant differences. The material included in Tables IV.1 - IV.5 is provided to assist trainers with presenting procedures for conducting individual transition planning meetings and for developing ITPs. Although these tables are a compilation of some of the best-known and most widely used procedures nationally, trainers are encouraged to assess the status of transition planning in their states and localities and to consult the references and resources indicated at the end of this section for more information.

Transition planning is in the infancy stages. Many states and localities are just beginning to develop and disseminate guidelines in their own localities (Everson, 1987). Skilled trainers must keep abreast of the growth of transition efforts across the country as they prepare inservice workshops on transition planning.

Interagency Transition Planning Training

Goal 4

Table IV.1

Relationship between IEPs, ITPs, IPPs, and IWRPs

1.1 IEP (Individual Education Program)

- developed by educators, educationally related services and parents
- targets skill acquisition

1.2 ITP (Individual Transition Plan)

- developed by educators, educationally related services, adult services, and parents
- targets adult outcomes and support services needed to obtain and retain services

1.3 IPP/IHP (Individual Program Plan/Individual Habilitation Plan)

- developed by residential adult service providers and case managers
- targets skill acquisition and programming needs

1.4 IWRP (Individual Written Rehabilitation Plan)

- developed by vocational rehabilitation agency
- targets postsecondary vocational training, placement and/or independent living needs

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Interagency Transition Planning Training

Goal 4

Table IV.2

Target Areas for Transition Planning

2.1 Employment outcome or post-secondary education needs

2.2 Residential needs and outcome

2.3 Financial/Income needs

2.4 Recreation/Leisure outcomes

2.5 Medical needs

2.6 Social/Sexual needs

2.7 Transportation needs

2.8 Advocacy/Legal needs

2.9 Personal/Home/Money management needs

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Interagency Transition Planning Training

Goal 4

Table IV.3

Timeline for Transition Planning

3.1 Early Secondary Years
(approximately ages 14-16)

- begin assessment of needs in nine transition areas
- begin formal ITP development
- begin vocational education (as appropriate) or assume vocational training as part of secondary special education curricula

3.2 Middle Secondary Years
(approximately ages 16-20)

- continue assessment of needs in nine transition areas
- submit local needs assessment data on this age group to core team/local agencies
- maximize vocational portion of secondary program
- to 75% to 100% of day
- continue formal ITP planning
- begin referral process of all needed agencies

3.3 Final Secondary Year
(approximately ages 20-21)

- hold "exit" transition meeting
- assure needs and outcomes in all nine transition areas
- assure all relevant referrals and availability of follow-along and support services

3.4 Post-Secondary Years (Approximately ages 21-25)

- conduct follow-up survey to evaluate effectiveness of transition planning
- assure continuation and appropriateness of all follow-along services

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Goal 4

Table IV.4

Who should attend the ITP meeting?

4.1 The Special Education Teacher

4.2 The Vocational Education or Vocational Special Needs Teacher (if appropriate)

4.3 The Parent(s) or Guardian

4.4 The Student

4.5 (During the final secondary year), the Vocational Rehabilitation Counselor

4.6 (During the final secondary year), the Case Manager

4.7 Other related services or support services staff as identified for individual students (e.g., occupational therapist, social worker, job coach, etc.)

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Interagency Transition Planning Training

Goal 4

Table IV.5

Procedures for Conducting ITP Meetings

5.1 Identify all targeted students for transition planning

- identify age to begin process
- identify population to receive services

5.2 Organize an ITP team for all students

- identify specific students
- identify all school personnel
- identify adult service providers
- identify timeline for team members' involvement

5.3 Define procedures for writing ITPs

- addenda to IEP
- identify format

5.4 Schedule an ITP meeting for all targeted students

- hold as part of IEP process
- develop transition plan which targets outcomes and services in all nine transition areas

5.5 Implement the ITP goals for all students

- use an interdisciplinary approach
- use an interagency approach
- initiate referral process

5.6 Update the ITP annually for all students

- as students approach end of their secondary programs, fade involvement of school personnel while increasing involvement of adult services personnel
- continue referral process/re-evaluate goals

5.7 Hold an "exit" transition meeting during final secondary year

- assure outcomes and needs are targeted in all nine transition areas
- assure all needed referrals and support services
- identify procedures and responsibilities for postsecondary follow-up

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Interagency Transition Planning

Goal 4

Activity IV.1

Writing Individual Transition Plans

Purpose of the Activity: to apply information from writing transition plan lecture to actually writing a transition plan for a student.

Target Audience: Professionals and parents (up to 50 individuals) in groups of 5-7 each.

Length of Time Required for Activity: 30-45 minutes

Materials:
- case study for each group
- blank transition plan for each group
- role assignment for each person (e.g., special education teacher, parent, vocational rehabilitation counselor, etc.)
- evaluation form for each group

Summary of Activity: Break the large group into groups of 5-7 individuals. Pass out a set of role assignment cards to each group. Each group needs to have one member identified as: 1) a special education teacher; 2) a vocational education or vocational special needs teacher; 3) a rehabilitation counselor; 4) a parent; 5) a student; 6) a case manager from the local mental health/mental retardation agency and/or 7) a school social worker. Other members may be added as needed if the groups are large (i.e., an administrator, another parent, etc.)

After each group has read the case study have them work as a team to identify: 1) a goal under four or five of the targeted areas indicated on the transition plan that seem to be most critical for the student; 2) an agency(ies) responsible for each of the goals; and 3) a timeline (targeted completion date) for the goal. Allow 20-30 minutes for this. Give each group a copy of the ITP evaluation form and ask them to respond to each of the statements.

Bring the small groups back together as one large group and have them share their goals, responsibilities, and agencies.

For discussion:

- Are the targeted goals representative of services available in the locale and representative of the "best" options for the students? Is there a discrepancy between the two?
- Were team members required to play different roles than those which were traditionally played in order to achieve the targeted goals?

Sample Case Study

Susan is a 20 year-old student with Down Syndrome enrolled in a self contained special education classroom in a regular high school. Psychological testing has placed her in the low moderate range of mental retardation. She has been a student in a classroom for TMR (trainable mentally retarded) students for 13 years. Susan is involved four days each week in a community-based vocational training program in which she is learning some of the skills required for food service occupations. Her teacher feels that Susan has demonstrated much progress in this food service training program and thinks that competitive employment might be possible.

Susan's parents have never given much thought to competitive employment but rather have been planning for Susan to attend the local sheltered workshop. Lately however, her parents have become discouraged about getting a place for Susan at the sheltered workshop as there is a waiting list of approximately 48 individuals ahead of Susan and more who will be competing for the slots from her graduating class. The parents have also looked into a day activity center in their community. They were very disappointed to find out that they would have to pay a fee for Susan to be able to go to the day activity center. As school had always been a free service, they were surprised to find out that Susan would not necessarily be entitled to free services as an adult.

The TMR teacher has talked briefly with the parents about post-school plans for Susan. She also has contacted the rehabilitation counselor assigned to the school and asked her to attend Susan's "exit" transition meeting. The rehabilitation counselor has agreed to attend the meeting to discuss Susan's "employment potential" after she leaves school. The MR case manager has also agreed to attend the "exit" meeting.

The teacher wants to write an effective plan for Susan to assure some better alternatives for adulthood, but does not know the best way to achieve the outcomes she wants for Susan and that she feels Susan wants.

Role play Susan's "exit" transition meeting and develop an ITP for her.

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Sample Case Study

Carla is a 17 year old student currently enrolled in a special education center serving youth between the ages of 2 and 21 with cerebral palsy. Her primary disability is motor impairment caused by cerebral palsy. She has spastic quadruplegia and is confined to a wheelchair, with functional but slow use of both hands. Psychological testing places Carla in the mild range of mental retardation with perceptual problems also being evident. Carla can read on a third grade level and can do simple addition, subtraction and multiplication. She will be earning a special education certificate upon graduation.

Carla has been involved in a vocational training program which has trained her for entry level positions in the areas of computers and micrographics. She was able to participate in a community based training experience as a micrographics clerk. Her work site supervisor said that her quality of work was very good, but that she needed improvement in her work rate. Carla also displayed some inappropriate social interactions on the job site, namely complaining when her supervision brought more work to her work station.

Carla has a weight problem which contributes to her difficulty with independent living skills. She is unable to transfer from her chair to a toilet independently. Nor is she able to independently enter and leave her home as there is no ramp for her to use. It is also difficult for her to wheel up some ramps.

Carla says she wants to work part-time but needs for the hours to be such that there is a family member to help her get her wheelchair in and out of the house. The parents are both supportive of employment and want to discuss whatever services are available with the ITP team.

Role play Carla's transition planning meeting and develop an ITP for her.

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Sample Case Study

John is a 19 year old student currently enrolled in a special education school which he has attended for 16 years. He is scheduled to graduate in a year and a half. Psychological testing places him in the moderate range of mental retardation with mild perceptual and neurological disabilities. His medical records report no significant physical abnormalities, other than obesity and poor oral hygiene. John's school records indicate that he has excellent social skills, but few significant interpersonal relationships.

He has acquired simple counting skills and basic word recognition skills but he is unable to tell time or discriminate between coins. John's teacher reports a history of temper tantrums, noncompliance, absenteeism, and "sarcasm" to persons in authority. She feels that John needs to spend more time in pre-academic and pre-employment preparation.

His mother is supportive of employment training and would like to see John be able to work after graduation. She is concerned about possible loss of social security benefits because she and John's younger sister depend on this income. John does very little work around the home because his mother feels that he is unwilling to "help out".

John has attended the workshop in his school for two years, where he has learned simulated benchwork types of tasks. Additionally, he has participated in a community-based vocational training program through his school for six months. Three days a week, John and three other students work at a local nursing home under the supervision of their special education teacher. John's major responsibilities include mopping, emptying trash, serving food, and running errands. His teacher describes him as a slow, steady worker who likes praise and ignores prompts to work more quickly from his teacher and the worksite supervisor. On multiple occasions, he has walked off the job when criticized or reprimanded for aggressive behavior. John's teacher feels that competitive employment is not a realistic long-term goal for John unless he acquires the necessary work-related skills that are required. She is unaware of any post-graduation options that may increase John's employment potential other than the local sheltered workshop.

The vocational rehabilitation counselor and the mental retardation counselor have agreed to attend the ITP meeting.

Role play John's transition meeting and develop an ITP for him.

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Interagency Transition Planning Training

Goal 4

Activity IV.1

Individual Transition Planning Meeting Packet

This student has reached an age in his or her school program where the primary purpose of all instruction should be to facilitate normalized integration into the community as an adult citizen. Therefore this Individualized Transition Planning (ITP) meeting should seek to develop goals and objectives which will bring about post-school living outcomes such as employment, community and residential independence, as well as the ability to spend leisure time appropriately as an adult.

To assure continuity of service provision from school to adult services, the appropriate adult service agency(ies) representative(s) should be in attendance and should participate fully in the ITP meeting process. The planning team should consist of: 1) school representatives 2) adult agency representatives; 3) parents; and 4) student. The purpose of this meeting should be to develop transitional goals and objectives to achieve employment and independent living outcomes for the student before he/she actually exits the school program, and to assign responsibilities to school and adult agency representatives for provision of services.

____
Transition Planning Coordinator

Individual Transition Planning Team Members

________________________	________________________
________________________	________________________
________________________	________________________

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Interagency Transition Planning Training

Goal 4

Activity IV.1

Name of City Schools

Interagency Release of Information Authorization

To assure a a smooth and uninterrupted transition from school to adult services, this form authorizes the agencies listed below to share confidential information on the student listed below during the final two years he/she is enrolled in the (Name of City) School system. As a part of the transition planning process, the agencies listed below will be working cooperatively during this period to arrange for post school services and outcomes that are the most advantageous and desirable for the student and the student's family and/or primary care giver. Care will be taken by all agencies involved to only release that information which is required for effective and efficient implementation of services. Confidential information to be included in this interagency information release agreement may include but not be limited to: educational, psychological, medical, social and vocational information relevant to this student's needs as an adult in the community.

Student Name:______________________ Date of Birth:____________
Social Security Number:____________ Date of Graduation:____________
Date information can be released ____________

Agencies to share access to confidential information:

(Name of School) Address	Local Vocational Rehabilitation Agency
______________________	______________________
______________________	______________________
______________________	______________________
Contact Person:____________	Contact Person:____________
Phone:____________	Phone:____________
Local Mental Health/Mental Retardation Agency	OTHER:
______________________	______________________
______________________	______________________
______________________	______________________
Contact Person:____________	Contact Person:____________
Phone:____________	Phone:____________

______________________ ______________________
Student/Client Signature Parent/Guardian Signature

______________________ ______________________
Witness Date

Interagency Transition Planning Training

Goal 4

Activity IV.1

Targeted Areas for Transition Planning

1.1 Employment

1. Competitive employment-no support
2. Competitive employment-transitional or time limited (OJT, JTPA)
3. Supported competitive employment minimum wage or above individual placement
4. Supported job-subminimum wage, individual placement
5. Enclave-small group placed in existing business, ongoing
6. Mobile work support crew-small group in community
7. Entrepreneurial model-small private business
8. Sheltered Workshop
9. Day Activity Center
10. Other ________________

or

Post Secondary Education

1. Community college/university
2. Vocational technical center
3. Other ________________

1.2 Residential

1. Independent living - no support
2. With family or relative
3. With roommate
4. ICF-MR (on-going support)
5. Group home - specialized training
6. Supervised apartment
7. Adult foster care
8. Adult nursing home
9. Other ____________________

1.3 Financial/Income Needs (May be combination of sources)

1. Earned wages only
2. SSI only
3. SSI & earned wages
4. Unearned income (gifts, family support)
5. Trust/will
6. Food stamps
7. Other ____________________

1.4 Recreation/Leisure Needs

1. Independent recreation and leisure
2. Family supported recreation and leisure
3. Specialized recreation for disabled
4. Community parks and recreation programs
5. Church groups
6. Local clubs
7. Other ____________________

1.5 Medical Needs

1. Group insurance policy available (e.g. Medicaid, Champus, Blue Cross, etc.)
2. Independent in monitoring medical needs and scheduling appointments
3. Requires medical supervision and scheduling
4. Other ____________________

1.6 Social/Sexual Needs

1. Needs family planning services
2. Needs support group
3. Needs counseling services
4. Needs respite care
5. Other ____________________

1.7 Transportation Needs

1. Independent needs no services
2. Public transportation
3. Specialized transportation
4. Family transports
5. Car pools
6. Other ________________

1.8 Advocacy/Legal Needs

1. Guardianship need
2. Other ________________

1.9 Personal/Home/Money Management

1. Independent-needs no services
2. Self-care skills
3. Citizenship skills
4. Money management skills
5. Use of community resources
6. Housekeeping skills
7. Meal preparation skills
8. Other ________________

Interagency Transition Planning Training

Goal 4

Activity IV.1

Sample Transition Plan

1.1 Employment or Post-Secondary Education Goal________________________

____

____

Steps needed to accomplish goal______________________________________

____

____

____

____

____

Projected date of completion____

Agency(ies)/Discipline(s) involved____________________________________

____

Person(s) responsible____

____

1.2 Residential Goal____

____

____

Steps needed to accomplish goal______________________________________

____

____

____

Projected date of completion________________________

Agency(ies)/Discipline(s) involved________________________

Person(s) responsible________________________

1.3 Financial/Income Goal________________________

Steps needed to accomplish goal________________________

Projected date of completion________________________

Agency(ies)/Discipline(s) involved________________________

Person(s) responsible________________________

1.4 Recreation/Leisure Goal________________________

Steps needed to accomplish goal________________________

Projected date of completion

Agency(ies)/Discipline(s) involved

Person(s) responsible

1.5 Medical Goal

Steps needed to accomplish goal

Projected date of completion

Agency(ies)/Discipline(s) involved

Person(s) responsible

1.6 Social/Sexual Goal

Steps needed to accomplish goal________________________________

____

____

____

____

____

Projected date of completion__________________________________

Agency(ies)/Discipline(s) involved____________________________

____

Person(s) responsible____

____

1.7 Transportation Goal_______________________________________

____

____

Steps needed to accomplish goal________________________________

____

____

____

____

____

Projected date of completion__________________________________

Agency(ies)/Discipline(s) involved____________________________

____

Person(s) responsible____

____

1.8 Advocacy/Legal Goal____________________

Steps needed to accomplish goal____________________

Projected date of completion____________________

Agency(ies)/Discipline(s)involved____________________

Person(s) responsible____________________

1.9 Personal/Home/Money Management Goal____________________

Steps needed to accomplish goal____________________

Interagency Transition Planning Training

Goal 4

Activity IV.1

Adults Services Referral and Needs Checklist for Transition Planning

Service Item	needed	Date to be Completed	Person Responsible	Date Completed
Referral to Vocational Rehab.				
Refer. to MH/MR Services				
Referral to				
Referral to				
Referral to				
Social Security Application				
Medicaid Application				
Medicare Application				
SSI				
SSDI				
Medical Exam				
Psychological Update				
Social History				
Educational Summary				
Application for Special Transportation				
Residential Services				
Family Support				
Respite Services				
Counseling				
Vocational Evaluation				
Waiver for Min. Comp. Test				

Interagency Transition Planning Training

Goal 4

Activity IV.1

Evaluation of ITP Meetings

GROUP ____________________

Respond to the following statement by circling the appropriate number on the Likert scale under each item.

5	4	3	2	1
very successful	somewhat successful	unsure	not so successful	completely bombed

The ITP team meeting was successful in:

1. Identifying and agreeing upon desired outcomes and appropriate post school options for the student.

   5 4 3 2 1

2. Identifying steps in reaching these outcomes.

   5 4 3 2 1

3. Assigning the appropriate individual and or agency responsibility for goals and steps.

   5 4 3 2 1

4. Setting a timeline for meeting goals and steps.

   5 4 3 2 1

5. Involving all participants in the meeting process.

   5 4 3 2 1

6. Eliciting parent input in the planning process.

   5 4 3 2 1

7. Eliciting student input in the planning process.

5 4 3 2 1

8. Expressing the student's strengths and weaknesses in a positive manner.

5 4 3 2 1

9. Overall evaluation of this meeting.

5 4 3 2 1

Wendy Wood, Director of Employment Services
Rehabilitation Research and Training Center

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Goal 5: Implementing Interagency Transition Planning at Local Community Level:

Comprehensive transition planning requires a commitment from educational and adult service providers to: 1) identify expected student outcomes; 2) assess current outcomes and current service delivery systems; 3) develop a plan of action for bringing about changes and collaboration; and 4) evaluate new student transition outcomes. The overall effectiveness of transition planning must be evaluated by the evidence of new and different outcomes from those which have traditionally been available for youth with moderate and severe disabilities. This requires a commitment from both state and local policy makers and services providers.

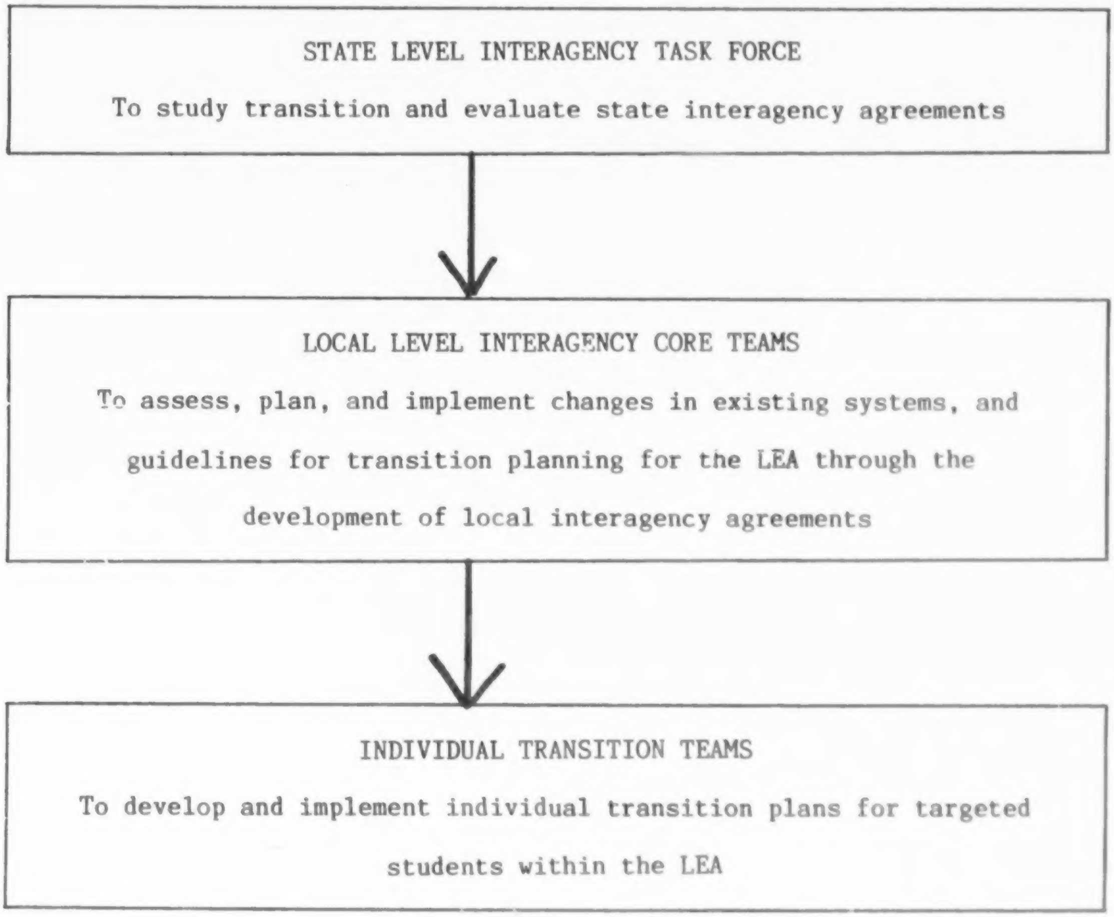
The materials and concepts included in Tables V.1 - V.5 are based on previous work by McCarthy, Everson, Wood, Inge & Barcus (1985) and Wehman, Moon, Everson, Wood & Barcus (1987). Trainers are encouraged to consult these materials along with the other materials included in the reference and resource list at the end of this section for more information. The materials are provided to assist trainers with presenting an inservice workshop on developing local interagency transition task forces or core teams, and on planning and implementing interagency transition procedures.

Interagency Transition Planning Training

Goal 5

Table V.1

Comprehensive Transition



STATE LEVEL INTERAGENCY TASK FORCE

To study transition and evaluate state interagency agreements

LOCAL LEVEL INTERAGENCY CORE TEAMS

To assess, plan, and implement changes in existing systems, and guidelines for transition planning for the LEA through the development of local interagency agreements

INDIVIDUAL TRANSITION TEAMS

To develop and implement individual transition plans for targeted students within the LEA

Adapted from Wehman et al. (1987)

Interagency Transition Planning Training

Goal 5

Table V.2

Levels of Transition Planning Within a Locality

(Local Core Team)		(Individual Transition Planning Team)		
ADMINISTRATIVE LEVEL		SERVICES LEVEL		POST-SCHOOL OUTCOMES FOR STUDENTS
Interagency Planning For Transition	+	Implementation of Interagency Planning	=	Employment Residential Community Independence Leisure/Recreation

Interagency Transition Planning Training

Goal 5

Table V.3

What is a Local Core Transition Team?

A local core transition team is a small number of persons in a local community, optimally between five and eight, representing key agencies and a parent represenatative. Local core team members agree to serve as a catalyst for planning and implementing interagency transition from school to work procedures for youth with disabilities. A local core transition team may be initiated by a person in the local community or by an outside source contracted to assist the local team in the development of an interagency transition plan.

The purpose of a local core team is to serve as a task force in the development and coordination of local interagency agreements targeting transition from school to work services for youth with disabilities.

Interagency Transition Planning Training

Goal 5

Table V.4

Potential Members of a Local Core Team

Critical Team Members	4.1 Special Education Administrator
	4.2 Vocational Education Administrator
	4.3 Vocational Rehabilitation Administrator
	4.4 Mental Health/Mental Retardation Director
	4.5 Developmental Disabilities Planning Council Member
Other Team Members As Identified in Specific Localities	4.6 Parent representative and/or consumer advocate
	4.7 University Representative(s)
	4.8 Job Training Partnership Act (JTPA) program representative
	4.9 Private Industry Council (PIC) representative
	4.10 Social Security Administration representatives
	4.11 Rehabilitation Association representative
	4.12 United Way or other community services representative

Adapted from Wehman et al. (1987)

Interagency Transition Planning

Goal 5

Table V.5

Goals for Local Core Teams

5.1 Conduct Local Needs Assessments

- identify and assess school sponsored vocational training programs
- identify and assess adult services employment programs
- identify and assess secondary curricula in all areas of adult preparation
- identify and assess all other adult services programs (e.g., residential programs, recreation programs for special populations)
- identify and assess community programs which young adults with disabilities have not traditionally accessed, but which they could access with support
- conduct student follow-up studies of former secondary students
- disseminate findings locally

5.2 Establish Guidelines for Interagency Transition Planning

- target a population to receive formal transition planning
- target an age for students to begin to receive formal transition planning
- develop format for ITPs
- define roles and responsibilities of participating agencies and professionals
- plan cross-agency and cross-discipline inservice training programs
- plan parent training and support programs

4.3 Develop an Action Plan and Local Interagency Agreements

- identify all agencies and participants to be involved (if different from core team)
- identify purpose or mission statement of agreement
- identify goals of agreement
- identify responsibilities of agencies and professionals
- identify timelines
- write agreement
- disseminate agreement
- update and evaluate on a regular basis

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Interagency Transition Planning

Goal 5

Activity V.1

Transition Planning for Local Core Teams

Purpose of the Activity: to assist local core teams or task forces WHO ARE ALREADY OPERATING AS A GROUP (See Section II) in identifying their goals as a team OR for small groups of participants to apply the information on local transition planning using a simulated case study.

Target Audience: already operational interagency teams of 8-10 people each or simulated interagency teams of 6-8 people each. If teams do not already exist, break the trainees into interagency teams based on their locality.

Length of Time Required for Activity: 30-45 minutes

Materials:
- Case Study/Issues
- Paper/pencils

Summary of Activity: If local core teams are already operational, have them address issues and needs in their own locality instead of providing them with the attached case study. For teams who have been formed for the purpose of this activity, provide each group with a copy of the case study and accompanying issues for discussion. Allow each group 20 minutes to discuss the case study and the suggested ideas, address other issues, and develop an action plan for addressing the issues and concerns. Ask each group to share their action plan with the large group. Discuss similarities and differences in each group's action plan.

Interagency Transition Planning Training

Goal 5

Activity V.1

Local Core Team Case Study

The special education director for a school system in a medium sized city (population--180,000) has recruited the executive director of a rehabilitation facility, the director of mental retardation services, the director of the local Association for Retarded Citizens (ARC), a vocational rehabilitation administrator, the director of the local branch of United Cerebral Palsy (UCP), the special education administrator in the LEA, and two parents of transition-aged youth for membership in a local core transition planning team. The team members have agreed to explore transition issues for young adults in their community.

The community is a predominantly service-oriented community focusing on tourism. The community also has two large prime manufacturing businesses operating within the community. The unemployment rate is approximately 3%. There are limited public bus services from 6:30 a.m. to 9 p.m. daily, but no weekend services or services outside the city limits. There is one group home with a waiting list of 50 people.

The rehabilitation facility currently serves 200 individuals with mild-severe mental retardation and has a waiting list of 48 individuals. Special education graduates can expect to be placed on the waiting list for approximately two years. The executive director is concerned about the national trend to place more severely disabled persons into competitive employment in the community. She feels that more and more of the facility's clients are "not ready to work".

The special education director states that the school provides no community-based vocational training for students with moderate and severe disabilities. These students "work" in a simulated school-based workshop.

For the most part, parents and advocacy groups are concerned about the lack of residential and employment opportunities in the community for transition-aged youth. Several parents, however, are opposed to "supported employment" because they feel it is a passing fad and not adequately funded.

Role play this situation addressing the issues on the following page.

Issues to Address

1. Do any other agencies/organizations/individuals need to be represented on the core team?

2. What other information (if any) does the team need to collect?

3. What changes (if any) should the special education administrator and facility executive director consider?

4. What other new services need to be developed? or researched?

5. What are the steps/decisions the core team needs to take to develop an action plan for local systems change?

6. Construct a timeline for steps discussed above. Consider a budget and funding coalitions. Consider training/staffing needs and public awareness needs.

References and Resources for Interagency Transition Planning Training

The following references and resources may be useful to staff trainers in increasing their knowledge of transition planning. Several of the resources listed below also contain sample training materials and activities which may be combined with the sample materials in this manual and adapted to the needs of individual trainers and their targeted participants.

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Section VII

Supported Competitive Employment Training

By

Mike Barcus

Jane M. Everson Sherril Moon

M. V. Morton

Supported Competitive Employment Training

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What is Supported Competitive Employment?

Supported competitive employment (also known as the supported work model) is one model of supported employment (Wehman & Kregel, 1985). It is an employment approach for individuals with moderate and severe disabilities which enables them to be placed, trained, and supported in competitive jobs in integrated environments with the assistance of professional "job coach" or employment specialist services. In the supported work model, individuals are hired at minimum wage or above by an employer from the very first day of job placement. An employment specialist accompanies the new employee to the job site from the first day of employment and provides intensive job site training, advocacy, and support (Moon, Goodall, Barcus, & Brooke, 1986). Gradually, the job trainer reduces the time and intensity of training he or she provides the employee. However, the supported work model enables a job trainer to re-enter the job site and provide additional training, advocacy or support whenever needed. Unlike many other habilitation models for individual with disabilities, the supported competitive employment model is a place, train, and support model.

Who Should Be Targeted for Inservice Training?

Inservice training on supported competitive employment will target both administrators and direct service providers in education and adult services agencies. Professionals who are responsible for program implementation and program management may both participate in inservice training, although their needs and therefore the goals of inservice training will be different. This section provides an overview of the supported work model for trainers who will be providing an introduction and overview of the supported work model to participants. For more specific guidelines on providing inservice training on the supported work model and other supported employment models, the trainer is referred to the references and resources at the end of this section.

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What is the Role of the Trainer?

The role of the trainer is to provide information in seven broad areas including: 1) definition and philosophy of the supported work model; 2) the job development component; 3) the consumer assessment component; 4) the job placement component; 5) the job site training component; 6) the ongoing assessment and follow-along component; and 7) program management.

Whenever possible, the trainer should have participants identify and prioritize their training needs prior to the development and delivery of inservice training. This may be accomplished using one or a combination of the strategies suggested in Section I. Experienced (and flexible) trainers may use an opening activity during the first hour or day of training to reassess the training objectives and content. This is a critical role for the trainer to assume because it provides the trainer with information not only on the participants' needs, but also with preliminary information on the skills held by the participants.

What Are the Trainer's Goals and Objectives in Supported Competitive Employment Training?

Goals and Objectives

It is the role of the trainer to present information and to facilitate activities and discussions which accomplish objectives under each of the seven identified training goals:

Goal 1: Definition and Philosophy of the Supported Work Model:

Objective 1.1 to define the supported work model of competitive employment

Objective 1.2 to discuss values and philosophies associated with the supported work model

Objective 1.3 to discuss the similarities and differences between the supported work model and other supported and non-supported approaches to employment for persons with disabilities

Goal 2: Job Development Component of the Supported Work Model:

Objective 2.1 to describe guidelines for conducting a community job market screening

Objective 2.2 to describe guidelines for making employer contacts

Objective 2.3 to describe guidelines for analyzing a job site and a specific job

Goal 3: Consumer Assessment Component of the Supported Work Model:

Objective 3.1 to discuss use of a combination of formal and informal assessment mechanisms:

a) formal vocational evaluation
b) parent/consumer/caregiver interviews
c) consumer observation and behavioral assessment

Goal 4: Job Placement Component of the Supported Work Model:

Objective 4.1 to discuss job compatibility analysis.

Objective 4.2 to describe incentives to employers for hiring workers with disabilities.

Objective 4.3 to describe disincentives and barriers to employment for workers with disabilities.

Goal 5: Job Site Training Component of the Supported Work Model:

Objective 5.1 to describe strategies for use during the orientation and assessment phase of job site training.

Objective 5.2 to describe strategies for use during the initial skill acquisition phase of job site training

Objective 5.3 to describe strategies for use during the stabilization phase of job site training

Objective 5.4 to discuss advocacy with coworkers and supervisors on and off the job site

Goal 6: On-going Assessment and Follow-Along Component of the Supported Work Model:

Objective 6.1 to discuss guidelines for monitoring a worker's progress and maintenance of vocational and nonvocational skills

Objective 6.2 to discuss strategies for intervening with problems and concerns

Goal 7: Program Management:

Objective 7.1 to discuss time management for employment specialists

Objective 7.2 to discuss competencies and characteristics of employment specialists

Objective 7.3 to discuss strategies for funding and implementing all phases of the supported work model of competitive employment

Sample Training Activities and Materials for Supported Competitive Employment Training

The purpose of this section is not to present a step-by-step outline of activities and accompanying narration for trainers to use to address the goals and objectives in Section IV, but instead to present a sample of activities and materials which trainers may use to develop and expand upon their own ideas. Based on the principles of adult learning and guidelines for developing inservice workshops discussed in Sections I-IV, it is expected that trainers will wish to adapt the following activities and materials based upon their own values and experiences and upon the values and objectives of their targeted audiences.

Selection of the most appropriate information and activities from this section should be based on: 1) overall training time; 2) immediate needs of the trainees; 3) existing knowledge base of the trainees; and 4) agency and discipline make-up of the targeted audience.

Goal 1: Definition and Philosphy of the Supported Work Model

The supported work model offers an approach to employment which differs in several ways from more traditional approaches to employment for individuals with disabilities. First of all, it is designed for a population which has historically been denied community-based and well paid employment opportunities. Secondly, it is a place, train, and support model instead of a train and place model. Tables I.1 - I.7 provide an overview of the definitions, values, and philosophy of various supported employment models. The trainer may use this information to prepare a brief introductory lecture on the supported employment approach, including the differences and similarities between current models most commonly used. Activities I.1 and I.2 are examples of activities trainers can use to encourage participants to begin to think about their own values associated with employment programs for individuals with disabilities. A skilled trainer may use the information and activities in this goal to clarify participants' values and introduce the philosophy and goals of supported employment. Through the introduction of material covered in this goal, participants should understand the differences and similarities between the various supported employment models and be aware of the components of the supported work model of competitive employment.

Supported Competitive Employment Training

Goal 1

Table I.1

Definition of Supported Employment

Supported Employment is defined as:

> Paid employment for persons with developmental disabilities for whom competitive employment at or above the minimum wage is unlikely, and who, because of their disabilities, need intensive ongoing support to perform in a work setting; conducted in a variety of settings, particularly worksites in which persons without disabilities are employed; supported by any activity needed to sustain paid work by persons with disabilities, including supervision, training, and transportation.

(Developmental Disabilities Act of 1984)

Goal 1

Table I.2

Definition of Supported Employment

By definition, supported employment is for those people who need ongoing and intensive support. This excludes individuals who can work independently after a period of vocational rehabilitation, but defines no minimum prerequisite behaviors.

Typically, this definition includes individuals who currently participate in day habilitation or day/work activity programs who have not been accepted for vocational rehabilitation services.

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Supported Competitive Employment Training

Goal 1

Table I.3

Federal Criteria for Supported Employment as Suggested
by OSERS Grant Funding

3.1 Employment Status: minimum of 20 hours per week of paid work

3.2 Integration: eight or less workers with disabilities - other workers non-disabled

3.3 Ongoing Support: ongoing public funds available and necessary to sustain employment

3.4 Severe Disability Status: workers require ongoing job support to maintain successful employment

Supported Competitive Employment Training

Goal 1

Table I.4

Approaches to Employment for Individuals with Disabilities

PRE-EMPLOYMENT SERVICE PROVISION

Vocational Evaluation	Vocational Training	Work Adjustment	Job Placement

SUBSIDIZED EMPLOYMENT

OJT Placement	Employment training by employer. Wages subsidized by VR or ARC.	Unsubsidized Employment

POST EMPLOYMENT SERVICE PROVISION

Consumer Assessment + Job Analysis	Job Placement	Job-Site Training by Job Coach	Fading & Stabilization	Follow-Along

Developed by Wendy Wood, Director of Employment Services

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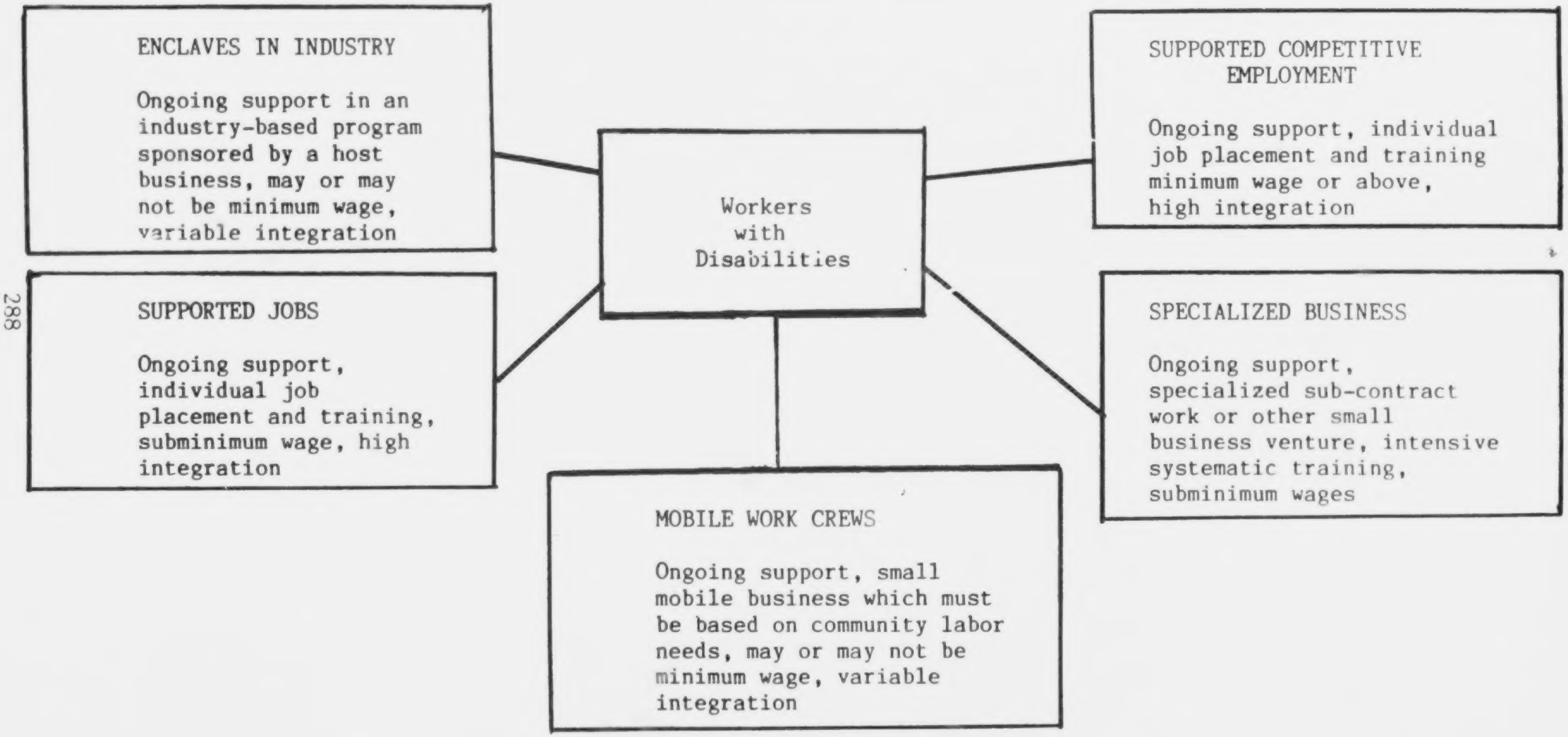
Supported Competitive Employment Training

Goal 1

Table I.5

Typical Supported Employment Models



ENCLAVES IN INDUSTRY

Ongoing support in an industry-based program sponsored by a host business, may or may not be minimum wage, variable integration

SUPPORTED COMPETITIVE EMPLOYMENT

Ongoing support, individual job placement and training minimum wage or above, high integration

Workers with Disabilities

SUPPORTED JOBS

Ongoing support, individual job placement and training, subminimum wage, high integration

SPECIALIZED BUSINESS

Ongoing support, specialized sub-contract work or other small business venture, intensive systematic training, subminimum wages

MOBILE WORK CREWS

Ongoing support, small mobile business which must be based on community labor needs, may or may not be minimum wage, variable integration

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Supported Competitive Employment Training

Goal 1

Table I.6

Philosophy and Values of Supported Employment

6.1 Persons with disabilities are PEOPLE first

6.2 Right to work/right to earn wages

6.3 Place/Train/Support (concept of "readiness" is irrelevant)

6.4 Emphasis on quality services to individuals vs. programs

6.5 Focus on ability vs. disability

6.6 No one program can do all and be all (interagency collaboration necessary)

6.7 Work takes place in integrated settings

6.8 Commensurate pay and fringe benefits

6.9 Variety of job choices for consumers

6.10 Ongoing survey of business and industry to identify jobs

6.11 Mechanisms established which guarantee ongoing support (interagency collaboration)

6.12 Consumer/parent participation in all phases of decision making

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Supported Competitive Employment Training

Goal 1

Table I.7

Supported Competitive Employment

STRUCTURAL FRAMEWORK:	Competitive Job With Job Coach Support
# OF WORKERS PER SITE:	One
INTEGRATION WITH NONDISABLED PEERS:	Daily Interactions at the Job-Site
WAGES:	Average $435/mo. (minimum wage or above)
SUPPORT:	1:1 Training on Job Duties and Non-Work Behavior
SUPERVISION BY SUPPORT ORGANIZATION:	Continuous Presence of Supervisor in Initial Training with Fading to Individualized Level of Contact
COMPONENTS OF THE SUPPORTED WORK MODEL OF COMPETITIVE EMPLOYEMENT:	Job Development, Consumer Assessment, Job Placement, Job Site Training, Follow-Along

Adapted from:

Moon, S., Goodall, P., Barcus, M., & Brooke, V. (1986). The supported work model of competitive employment for citizens with severe handicaps: A guide for job trainers (rev. ed.). Richmond: Virginia Commonwealth University, Rehabilitation Research and Training Center.

Wehman, P. (1981). Competitive Employment: New Horizons for Severely Disabled Individuals. Baltimore: Paul H. Brookes.

Supported Competitive Employment Training

Goal 1

Activity I.1

Positives and Negatives of Supported Competitive Employment

Purpose of the Activity: to assist participants with thinking about their own values related to supported employment opportunities

Target Audience: Professionals and parents (up to 50 people)

Length of Time Required for Activity: 25-45 minutes

Materials:
- 2 flip charts
- markers

Summary of Activity: The purpose of this activity is to discuss the pros (+'s) and cons (-'s) of supported competitive employment from four different perspectives: consumer, employment specialist, family, and agency. The trainer should randomly assign pairs of two participants to start discussion for each perspective regarding the "+'s" of that perspective (half the group). Then assign pairs of two people to discuss the "-'s" for each perspective (half the group).

Upon completion of formal presentation, the trainer should facilitate the activity. First, review with each group their role in the activity. Begin with one perspective (e.g., consumer) and have each group assigned to discuss "+'s" begin their discussion. Give each group an opportunity to express their response while encouraging other participants to contribute. The trainer should list the "+'s" each group mentions on one of the flip charts. At the end of the discussion the page(s) should be posted on the wall. Then have the groups assigned to discuss the "-'s" follow the same process. This process is to be repeated for both "+'s" and "-'s" for each perspective (e.g., family, agency, employment specialist).

At the end of the activity, the trainer should tell the participants that he or she will have the responses typed and disseminated to them by the end of the training or as soon as possible thereafter.

Supported Competitive Employment Training

Goal 1

Activity I.2

Fact or Fiction?

Purpose of the Activity: to assist participants in clarifying their values and to discuss the impact of supported employment as it applies to their current situations

Target Audience: Professionals and parents (up to 50 people)

Length of Time: 30-60 minutes

Materials:
- flip chart
- markers

Summary of Activity: Have the participants break into five groups of 5-8 people. Make sure every participant has a copy of the attached sheet (see FACT OR FICTION?) and assign each small group two questions listed on the sheet. The small groups should then discuss the assigned questions for 15 minutes and formulate a response for each question to their group. The responses should reflect the consensus of the group.

After the fifteen minute small group discussion period, the trainer should facilitate a large group discussion on each of the questions listed. Individual small groups that were assigned a specific set of questions should read their question(s) aloud and present the group's consensus response; then other groups should be encouraged to add any comments or reactions they view appropriate. The trainer should record all responses on the flip chart. Repeat the process for all 10 questions.

Goal 2: Job Development Component of the Supported Work Model

The supported work model of competitive employment as developed and practiced by the Rehabilitation Research and Training Center (RRTC) at Virginia Commonwealth University, has five components. The material in this section addresses the first component, job development. Job development includes a general screening of the local community to identify both current job openings and future job trends which might be appropriate for employees with disabilities. Tables II.1-II.3 and Activities II.1-II.2 present some guidelines for trainers to use when discussing job development strategies.

The material in this section lays the foundation for inservice training on the entire supported work model. This material may be used for a one-day workshop just on job development, to be followed by three to five more days of training on each of the other components of the model, or it may be condensed into a one to two-hour presentation as part of a day long workshop on the supported work model.

Supported Competitive Employment Training

Goal 2

Table II.1

Job Development Component

1.1 Community Job Market Screening

- Contact local chamber of commerce for current and future job trends
- Contact state employment commission for current and future job trends
- Become familiar with the local Yellow Pages
- Read and screen classified ads
- Contact local vocational rehabilitation counselors, job placement services, civic groups, sheltered workshops, and private industry council
- Talk directly with potential employers

1.2 Specific Employer Contact

- Telephone employers with and without advertised job openings
- Visit employers with and without advertised job openings
- Interview employers about current job openings and to market the supported work approach
- Describe and explain incentives and benefits of hiring workers with disabilities using the supported work model
- Assess the routine of job duties required if job looks favorable

1.3 Observation of Job Site

- Observe job and employees and analyze the environment
- Observe job and employees and analyze the specific job

From: Moon, Goodall, Barcus and Brooke (1986)

Supported Competitive Employment Training

Goal 2

Table II.2

Guidelines for Employer Contacts

Approach employers in a friendly, positive way. Show your interest in helping the employer as well as the prospective worker. Enthusiasm is a powerful persuader.

Visit the employer at a convenient time. Offer to come back later if the employer is very busy.

Dress in a business-like manner and always conduct yourself in a polite and professional way. (An employer may say "no" on the first visit, but depending on the impression you make, may be interested at a later time).

Use terms that will be of interest to the employer when describing your program and your consumers. Avoid rehabilitation lingo. Explain your role as a job trainer and your presence on the job site to train the worker and insure task completion.

Encourage the employer to ask questions and be prepared to give functional, work-related information about persons who are mentally retarded. Talk about the successful job retention and performance of workers who are mentally retarded and emphasize the positive characteristics of these workers. If you have placed other workers in the vicinity, ask for permission to use the supervisors as references during employer contacts.

Tell the employer about the financial incentives to hiring a worker who is handicapped such as the federal Targeted Jobs Tax Credit (TJTC) and the availability of National Association for Retarded Citizens On-The-Job Training (NARC-OJT) funds.

Ask for specific information about any job openings and record all information, using the Employer Interview Form and Sequence of Job Duties Form.

Arrange to observe the work area so that you can analyze the job duties and skills required.

From: Moon, Goodall, Barcus, & Brooke (1986)

Supported Competitive Employment Training

Goal 2

Table II.3

Analyzing an Employment Opportunity

3.1 Assessing the Specific Job

- Allow yourself enough time to observe all the work areas in which job duties are performed. If you are unable to complete the environmental analysis during your initial visit to the employer, arrange to return at another time.
- Write down in sequence all of the employee's work activities. This observation should comprise an initial task analysis of the job. Note approximate times spent in each work area and movement from one work area to another.
- Be sure to record any work-related interactions between employees. It is important to know whether or not the worker needs to verbally communicate during job performance.
- If possible, involve the employer by asking him or her to review your environmental analysis for feedback. You can ask them if any parts of the job could be modified.
- Do not interrupt the work flow, but if the employer approves, ask coworkers briefly about aspects of the job.

3.2 Summarize the findings

- Do not substitute the more general form of job analysis for an environmental analysis. You need the specific information on vocational skills and sequence of job duties which is collected during the environmental analysis.
- Complete the job analysis after your visit to the job site so that you can combine the information gained from the employer, coworkers, and your own observations.
- The job analysis indicates what skills are ultimately needed, not what skills are prerequisite to getting the job. Most job skills can be taught on the job.
- The job analysis is a "first impression" of job requirements. A more thorough task analysis will occur once you have begun job training.

From: Moon, Goodall, Barcus, & Brooke (1986)

Supported Competitive Employment Training

Goal 2

Activity II.1

Screening the Local Job Market

Purpose of the Activity: to assist participants in utilizing procedures for screening a local community job market

Target Audience: Parents and professionals (up to 25 people)

Length of Time Required for Activity: 15-30 minutes

Materials:
- Sunday classified ads from non-local community
- Yellow Pages from same non-local community (as above)
- local Sunday classified ads
- local Yellow Pages
- Community Job Market Screening Form
- overhead projector
- transparency
- overhead marker

Summary of Activity: Divide the large group into smaller groups of 4-6 people. Give half the groups the classified ads of the local Sunday newspaper and a copy of the local Yellow Pages. Give the other half the classified ads and Yellow Pages for the non-local community. Using the attached worksheet, the participants are to use the provided materials to: a) identify general job types available; b) identify specific potential contacts; and c) if possible, identify any developing businesses for future contacts. The small groups should be given 15-20 minutes to review the information, then each small group should share their findings with the entire participant group. The trainer should record the results of the local community market screening and then the results of the non-local community market screening.

The trainer should facilitate discussion on how each community is different and on the fact that a market screening is needed on a regular basis to determine a community's job market.

* Use this activity along with a brief lecture on national, state, and/or regional job trends. How are local trends similar? How are local trends different?

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Community Job Market Screening Form

Date Completed: ____________ Completed By: ________________

1. GENERAL SCREENING

List job openings that occur frequently (derive from classified ads, employment service listings, public service ads, etc.):

JOB TITLE/TYPE OF WORK	GENERAL REQUIREMENTS

2. SPECIFIC SCREENING

List potential appropriate companies or industries in this community to contact for job openings.

CURRENT

Company/Contact Person	Type of Work	Address/Phone

DEVELOPING

Company/Contact Person	Type of Work	Address/Phone

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Supported Competitive Employment Training

Goal 2

Activity II.2

Employer Contact Role Plays

Purpose of the Activity: to have participants practice employer contact through role play situations

Target Audience: Professionals (up to 25 people)

Length of Time Required for Activity: 15-30 minutes

Materials: . role play situations (handout)

Activity: The trainer should identify groups of two participants each, and assign one participant to be an employer and the other to be the job coordinator. Provide all the participants with the role play scenario. In each group, one participant, acting as a job coordinator, should then conduct the employer contact role play. Upon completion, each group should discuss within the larger group the +'s and -'s of how the contact was handled. Repeat the role play situation with each participant switching roles if time permits.

Supported Competitive Employment Training

Goal 2

Activity II.3

Employer Contact Situations

Purpose of the Activity: to assist participants in discussing strategies for addressing various employer contact situations

Target Audience: Professionals (up to 25 people)

Length of Time Required for Activity: 15-30 minutes

Materials: . employer contact situations (handout)

Summary of Activity: Divide the large group into small groups of up to 4 people. Provide each group with an employer contact problem/situation. Each group has ten minutes to discuss the problem/situation and to formulate strategies that would be recommended for the particular situation. At the end of ten minutes, each small group should describe their assigned problem and the strategies they recommend, encouraging members of the other small groups to contribute to the discussion. Repeat the process until each group has had an opportunity to present and discuss their assigned problem/situation.

Sample Employer Contact Situations

1. During initial contact, employer is reluctant to meet with the employment specialist.
2. The employer holds stereotypical views of the characteristics and abilities of persons with disabilities.
3. The employer does not view persons with disabilities as a feasible source of labor.
4. The employer has unrealistic expectations concerning workers with disabilities.

Goal 3: Consumer Assessment of the Supported Work Model

Job development and consumer assessment are often simultaneous phases of the supported work model for employment specialists. This component requires employment specialists to collect and assess both formal and informal evaluation data. Tables III.1 and III.2 present some guidelines for trainers when discussing consumer assessment as part of the supported work model for competitive employment.

Supported Competitive Employment Training

Goal 3

Table III.1

Forms of Consumer Assessment

The major forms of consumer assessment that are useful to an employment specialist include:

a) interviews and informal observations with consumers, primary caregivers, and current or past work or school supervisors;

b) the interpretation of formal educational, vocational, social psychological, and medical evaluations;

c) behavioral assessment in a real work setting of a consumer's abilities through observational and task analytic assessment of skills identified in the environmental analysis.

Consumer assessment information, both formal and informal, provides the employment specialist with an overall view of the consumer in regard to placement into competitive employment.

From Moon, Goodall, Barcus, & Brooke (1986)

Supported Competitive Employment Training

Goal 3

Table III.2

Consumer Assessment

2.1 Referral and placement policies based on the supported work model philosophy should be written and disseminated to school systems and agencies who will be potential referral sources

2.2 Review of Records

- school records
- vocational evaluation records
- medical records
- psychological records

2.3 Interviews

- with potential consumers
- with caregivers
- with current service providers

2.4 Informal Observation

- Observe the consumer in his or her current program.
- Assess strength, endurance, motivation, ambulation, sequencing directions, etc.

2.5 Behavioral Assessment

- Observe consumer in an actual community-based work site under the demands of a real job situation.

2.6 Consumer Screening Summary

- Summarize all assessment data: are parents/primary caregivers supportive? Does the consumer live near or have access to transportation?
- Is the consumer motivated to work?
- What skills and interests do the consumer already have in his or her repertoire which might help in the best job match?

2.7 Guidelines for Consumer Assessment

- Advertise your services in the community so that agencies and businesses are aware of your program.
- Acknowledge receipt of referrals promptly.
- Insure consumer confidentiality when records have been released to your program.
- Make time for personal interviews with consumer and family and explore their ideas and needs.
- Observe the consumer directly to determine such factors as endurance, strength, communication skills, and response to supervision.
- Inform consumer, family, and referral source of the results of the consumer screening. Include specific objectives that the consumer can work on to enhance competitive work potential.

From Moon, Goodall, Barcus, & Brooke (1986)

Goal 4: Job Placement Component of the Supported Work Model

The material in this section addresses job placement of individuals with disabilities in the supported work model. Placement involves evaluating job analysis data and consumer assessment information to determine the feasibility of placing potential candidates into a specific job that is currently available in their local communities. Tables IV.1-IV.3 present guidelines for trainers to use when discussing the job placement component of the supported work model.

Goal 4

Table IV.1

Job Placement

1.1 Steps to Job Placement

- Job Analysis/Consumer Employment Screening
- Job/Consumer Compatibility Analysis
- Consumer/Employee Interview
- Set Job Starting Date

1.2 Key Factors to Consider in Job Placement

- Accessibility to the Job
- Consumer Motivation
- Family/Guardian Support
- Physical Health
- Social Behavior
- Daily Living Skills

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Supported Competitive Employment Training

Goal 4

Table IV.2

Job/Consumer Compatibility Analysis

2.1 A detailed process of exploring the feasibility of placement for each of several potential workers into a specific job that has been analyzed and is vacant.

2.2 This process leads to the identification of the probable training needs of each consumer who is being considered for the position.

2.3 The process is NOT a match process; instead it is a means of targeting the major assets and liabilities of an individual in regard to an existing job opening.

2.4 The process is repeated for every job position that becomes available.

2.5 The process is helpful when working with individuals who are moderately disabled because it allows an objective means of identifying, from a pool of nearly equal job applicants, those who are most suitable for placement in the available position.

2.6 However, in situations where individuals are more severely disabled, it is necessary to assess the consumer's assets and liabilities, then locate a specific job for the individual!

2.7 The process does NOT determine whether an individual is unemployable.

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Supported Competitive Employment Training

Goal 4

Table IV.3

Job Interview

3.1 Inform the consumer of the date and time of the interview

3.2 Emphasize that she/he should be appropriately dressed

3.3 Review appropriate behavior

3.4 Arrange to transport the consumer

3.5 Take an active role during the job interview

3.6 Discuss pay, rate, hours, benefits, etc.

3.7 Negotiate for a work start date

3.8 Notify the consumer's family/guardian so that arrangements can be made for the first day of work

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Supported Competitive Employment Training

Goal 4

Activity IV.1

Job Development/Job Placement

Purpose of the Activity: to have participants practice the steps involved in job development and job placement

Target Audience: Professionals (up to 15 people)

Length of Time Required for Activity: one hour - one hour, 30 minutes

Materials
- Job Analysis Form for each group
- Employer Interview Form for each group
- Sequence of Job Duties Form for each group
- pre-identified and contacted job sites

Summary of Activity: Divide the large group of participants into groups of three to four people. Give each group the name and address of a previously contacted business to visit. Provide each group with the name of the employer or supervisor at the business. Assure that each business has agreed to participate in this activity as a training experience for participants and know an actual job placement search.

Participants should interview the employer or supervisor to gather as much information as possible to complete the Employer Interview Form and Job Analysis Form. Each group should then spend time observing one or more jobs at the site and continue to complete the Employer Interview Form and Job Analysis Form as well as the Sequence of Job Duties Form.

After the activity, bring the small groups back together as one large group and discuss the activity.

* What type of job(s) were observed?
* What marketing techniques did participants use?
* What concerns did the employers have?
* What was the work environment like?
* Would this be an appropriate job for a supported work placement?

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Employer Interview Form

Company: ______________________ Date: ______________

Phone: ______________

Person Interviewed: ______________________
Title: ______________________

Job Title: ______________________ Rate of Pay: __________

Work schedule: ______________________

Company benefits: ______________________

Size of company (or number of employees): ______________________

Volume and/or pace of work:

Overall: ______________ This position: ______________

Number of employees in this position: ______________

During the same hours: ______________

Written job description available: ______________

Description of job duties: (Record on Sequence of Job Duties Form)

Availability of supervision (estimate percentage of time): ______________

Availability of coworkers (direct or indirect): ______________

Orientation skills needed (size and layout of work area): ______________

What are important aspects of position:

Speed ___ vs. Thoroughness ___ Judgment ___ vs. Routine ___

Teamwork ___ vs. Independence ___ Repetition ___ vs. Variability ___

Other: ______________________

What are absolute "don'ts" for employee in this position (e.g., manager's pet peeves, reasons for dismissal, etc.)? ______________________

Describe any reading or number work that is required: ______________________

What machinery or equipment will the employee need to operate? ______________________

OBSERVATIONAL INFORMATION:

Appearance of employees: ______________________

Atmosphere:

- _____ Friendly, cheerful
- _____ Busy, relaxed
- _____ Slow, relaxed
- _____ Structured, orderly
- _____ Aloof, indifferent
- _____ Busy, tense
- _____ Slow, tense
- _____ Unstructured, disorderly

Other: ______________________

Environmental characteristics (physical barriers, extremes in temperature, etc.): ______________________

Comments: ______________________

SIGNATURE/TITLE: ______________________

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Job Analysis Form

Fill in Consumer's Name and SSN or affix pre-printed label.	Fill in Job Coach's Name and ID Code or affix pre-printed label.
[ ]	[ ]
Consumer:____________________	Staff:____________________
SSN:____________________	ID Code:____________________
Company:____________________	[ ]
DOH:__________ Code:__________ [ ]	

Name of Person Completing Form:______________________________

Analysis Date:__ __ /__ __ /__ __ (month/day/year)

Type: Initial ________ On-going ________

Company's Address: ____________________ Phone #:________________

Supervisor's Name:____________________ Title________________

Job Title:____________________ Current Hourly Rate____________

Number of Hours Per Week ________________ Months Per Year____________

Is monthly gross income $300.00 or more? yes_____no_____

General Directions: DO NOT LEAVE ANY ITEM UNANSWERED!

Indicate the most appropriate response for each item based on observations of the job and interviews with employers, supervisors, and coworkers. For yes/no items circle either yes or no for each item. *Indicate under each item whether it is considered IMPORTANT (I) or NOT IMPORTANT (NI) in this particular job.

	Weekend Work Required	Evening Work Required	Part-Time Job	Full-Time Job
1. Schedule I NI	Yes/No	Yes/No	Yes/No	Yes/No

Specifics/Comments:

2. Travel Location	On Public or Handicapped Transportation Route	Off Public or Handicapped Transportation Route
I NI	________	________

Specifics/Comments:

---

3. Initiation of Work/Motivation	Staff Will Prompt to Next Task	Volunteering Helpful	Initiation of Work Required
I NI	________	________	________

Specifics/Comments:

---

4. Strength: Lifting and Carrying	Very Light Work (4-5 lbs)	Light Work (10-20 lbs)	Average Work (30-40 lbs)	Heavy Work (> 50 lbs)
I NI	________	________	________	________

Specifics/Comments:

---

5. Endurance	Work Required for < 2 Hours; No Breaks	Work Required for 2-3 Hours; No Breaks	Work Required for 3-4 Hours; No Breaks	Work Required for > 4 Hours; No Breaks
I NI	________	________	________	________

Specifics/Comments:

---

6. Orienting	Small Area Only	One Room	Several Rooms	Building Wide	Building and Grounds
I NI	________	________	________	________	________

Specifics/Comments:

---

7. Physical Mobility	Poor Ambulation/ Sit/Stand in One Area	Fair Ambulation/ Stairs/Minor Obstacles	Full Physical Abilities	
I NI	________	________	________	

Specifics/Comments:

---

8. Work Rate	Slow	Average Steady Pace	Above Average/ Sometimes Fast Pace	Continual Fast Pace
I NI	________	________	________	________

Specifics/Comments:

---

9. Appearance Requirements	Grooming of Little Importance	Cleanliness Only Required	Neat and Clean Required	Grooming Very Important
I NI	________	________	________	________

Specifics/Comments:

---

10. Communication Required	None/Minimal	Key Words/ Signs Needed	Unclear Speech Accepted	Clear Commununication in Sentences/ Signs Needed
I NI	________	________	________	________

Specifics/Comments:

---

11. Appropriate Social Interactions	Social Interactions Not Required	Responding Appropriately Required	Interactions Required Infrequently	Interactions Required Frequently
I NI	________	________	________	________

Specifics/Comments:

12.	Behavior Acceptance Range	Many Unusual Behaviors Accepted	Few Unusual Behaviors Accepted	No Unusual Behaviors Accepted	
	I NI	______	______	______	

Specifics/Comments:

13.	Attention to Task/Perseverence	Frequent Prompts Available	Intermittent Prompts/High Supervision Available	Intermittent Prompts/Low Supervision Available	Infrequent Prompts/Low Supervision Available
	I NI	______	______	______	______

Specifics/Comments:

14.	Sequencing of Job Duties	Only One Task Performed at a Time	2-3 Tasks Required in Sequence	4-6 Tasks Required in Sequence	7 or more Tasks Required in Sequence
	I NI	______	______	______	______

Specifics/Comments:

15.	Daily Changes in Routine	No Task Changes	2-3 Task Changes	4-6 Task Changes	7 or More Changes
	I NI	______	______	______	______

Specifics/Comments:

16.	Reinforcement Available	Frequent Reinforcement throughout Task	Reinforcement Daily	Reinforcement Weekly	Minimal Reinforcement/ Pay Check Only
	I NI	______	______	______	______

Specifics/Comments:

17. Employer Attitude I NI	Very Supportive of Workers with Disabilities	Supportive with Reservations	Indifferent to Workers with Disabilities	Negative toward Workers with Disabilities
	________	________	________	________

Specifics/Comments:

---

18. Employer's Financial Requirements I NI	Financial Incentives Not Necessary	Requires Tax Credit or Incentive (e.g., TJTC, OJT)
	________	________

Specifics/Comments:

---

19. Object Discrimination I NI	Does Not Need to Distinguish between Work Supplies	Must Distinguish between Work Supplies with an External Cue	Must Distinguish between Work Supplies
	________	________	________

Specifics/Comments:

---

20. Time I NI	Time Factors Not Important	Must Identify Breaks/Meals/ Etc.	Must Tell Time to the Hour	Must Tell Time to the Minute
	________	________	________	________

Specifics/Comments:

---

21. Functional Reading I NI	None	Sight Words/ Symbols	Simple Reading	Fluent Reading
	________	________	________	________

Specifics/Comments:

22. Functional Math	None	Simple Counting	Simple Addition/ Subtraction	Complex Computation Skills
I NI	_____	_____	_____	_____

Specifics/Comments:

---

23. Benefits of Job:

Yes/No 0 = None
Yes/No 1 = Sick Leave
Yes/No 2 = Medical/Health Benefits
Yes/No 3 = Paid Vacation/Annual Leave
Yes/No 4 = Dental Benefits
Yes/No 5 = Employee Discounts
Yes/No 6 = Free or Reduced Meals

---

24. Street Crossing	None	Cross 2 Lane Street with Light	Cross 2 Lane Street with-out Light	Cross 4 Lane Street with Light	Cross 4 Lane Street without Light
I NI	_____	_____	_____	_____	_____

Specifics/Comments:

CHECK ALL THAT APPLY TO POSITION:

Bus Tables __________
Food Prep. __________
Buffing __________
Dusting __________
Stocking __________
Sweeping __________
Assembly __________
Vacuuming __________

Restroom Cleaning __________
Washing Equipment __________
Dish Machine Use __________
Mopping (Indust.) __________
Food Line Supply __________
Trash Disposal __________
Food Serving __________
"Keeping Busy" __________

Clerical __________
Pot Scrubbing __________
Other __________

COMMENTS:

1. Size of company (or number of employees): __________

2. Volume and/or pace of work (slow, medium, fast):

Overall: __________ This position: __________

3. Rate of employee turnover (percentage):

Overall: __________ This position: __________

4. Number of supervisors ________________________

Rate of turnover ____________________________

5. Number of employees in this position: _______________

During the same hours: _______________

6. Number of non-handicapped employees
in immediate area
(50 ft. radius): _______________

7. Is this position visible to the public? ________________

8. Written job description available? __________________

9. What are absolute "don'ts" for employee in this position (e.g., manager's pet peeves, reasons for dismissal, etc.)? ______________________________________

10. Environmental characteristics (physical barriers, extremes in temperature, etc.): ______________________________________

11. Level for Social Contact: (circle one)

(0) - Employment in a segregated setting in which the majority of interactions with nonhandicapped persons are with caregivers or service providers. Example: Sheltered Workshop, Adult Activity Center.

(1) - Employment in an integrated environment on a shift or position which is isolated. Contact with nonhandicapped coworkers or supervisors is minimal. Example: Night Janitor.

(2) - Employment in an integrated environment on a shift or position which is relatively isolated. Contact with nonhandicapped coworkers or supervisors is available at lunch or break. Example: Pot Scrubber.

(3) - Employment in an integrated environment in a position requiring a moderate level of task dependency and coworker interaction. Example: Dishwasher required to keep plate supply stacked for cooks.

(4) - Employment in an integrated environment in a position requiring a high degree of task dependency and coworker interaction and/or high level of contact with customers. Example: Busperson/Porter.

Additional Comments: ______________________________________

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Sequence of Job Duties Form

☐ Daily
(Job duties remain the same from day to day)

☐ Varies day to day
(If checked here, complete a separate form for each different sequence)

If above box is checked, indicate day for which this form is completed:

☐ Mon ☐ Tues ☐ Wed ☐ Thurs ☐ Fri ☐ Sat ☐ Sun

Approximate Time	Job Duty

Comments: ______________________________

SIGNATURE/TITLE: ______________________ DATE: __________

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Goal 5: Job Site Training Component of the Supported Work Model

In the supported work approach to job training, an employment specialist or "job coach" is available to be on the job site for as long as is necessary to maintain the employee in the job. Job site training consists of three phases: orientation and assessment, initial skill training, and stabilization (Barcus, Brooke, Inge, Moon, & Goodall, 1987). Job site training involves direct instruction of job duties and related non-vocational skills as well as ongoing advocacy that promotes the worker's adjustment to the work environment.

Effective trainers must be able to present and discuss in-depth "how to" strategies for employment specialists to use on job sites. The material in Tables V.1 - V.4 and Activities V.1 - V.3 present an overview of issues and strategies the inservice trainer may wish to discuss. A skilled inservice trainer must carefully differentiate between employment oriented vocational skills training provided to students as part of a school program and job site training which takes place after job placement in the supported work model.

Supported Competitive Employment Training

Goal 5

Table V.1

Orientation and Assessment

1.1 1st Day of Work

- Drive employee to work
- Arrive at the job site early
- Show the employee location of restroom, telephone, employee lounge, supervisor's office
- Assign the employee to a job task that she or he can complete independently (without total supervision)
- Reinforce the employee frequently for "hanging in there" and remaining on the job

1.2 Orientation Training to the Work Environment

- Have the employee follow the same route each day
- Enter and exit the building using the same entrance each day
- Help the employee locate her or his primary work station in relation to other work environments
- Have the employee locate other work environments in relation to her or his primary work station

1.3 Orientation to the Community

- Determine the range of feasible transportation options
- Discuss options with the employee and her/his family/guardian

- Mutually select the most feasible option
- Design a transportation training program (if necessary)

1.4 Assessment on the Job Site

- Identify major job tasks/duties
- Note approximate time each major duty is performed
- Sequence major duties according to when they occur
- Identify variance from the schedule on a day to day basis
- Identify skills that are necessary to perform each major job duty
- Field test the job duty analysis
- Have the final job task analysis approved by the supervisor and give her or him a copy

1.5 Employee Evaluation

- Have the employer or immediate floor supervisor complete an employee evaluation two weeks after the employee's first day of work
- Prepare a progress report
- Review progress with the employee, employee's family, and employer
- Have the employer complete an evaluation one month from the employee's first day
- Review progress with employee, employee's family, and employer

1.6 Job/Consumer Compatibility

- Review all information gathered during the first two weeks of the placement to identify critical or potential problems

From Barcus, Brooke, Inge, Moon and Goodall (1987)

Supported Competitive Employment Training

Goal 5

Table V.2

Initial Skill Acquisition

2.1 Establish a Training Schedule

- review the sequence of job duties
- identify the major duties to be trained
- establish when during the day instuction will occur

2.2 Complete a Detailed Job Duty Task Analysis

- observe coworkers performing the job
- identify each step they perform
- record each step in sequence
- using the sequence, perform the job duty yourself
- revise as needed

2.3 Determine the Employee's Initial Performance Level

- collect probe data before instruction begins

2.4 Choose Instructional Techniques

- response prompts
- response cues
- response prompt hierarchy
- redundancy cues
- reinforcement

2.5 Establish a Written Instructional Program

Make sure it includes:

- training schedule
- individualized job duty task analysis
- reinforcement procedures
- instructional techniques
- training procedures
- data collection procedures
- procedures for fading instruction

2.6 Implement Training

- implement the instructional program
- collect data
- graph and review weekly
- systematically modify the instructional program as needed
- fade instruction and trainer presence

From Barcus, Brooke, Inge, Moon and Goodall (1987)

Supported Competitive Employment Training

Goal 5

Table V.3

Stabilization

3.1 Increase Production to Company Standard

- verify production standards
- determine the employee's current production level
- select instructional methods to increase production rate
- implement procedures to fade instruction and trainer presence from the immediate work environment

3.2 Stabilize Job Performance Under Natural Environmental Conditions

- program natural cues
- program natural consequences
- program natural reinforcers
- expand performance across supervisors
- expand performance across job situations

3.3 Expand Performance Across Job Duties

- increase production on initial skill being trained
- concurrently identify the next duty to be trained
- design and implement skill acquisition program for the next major duty
- check on-task/attending behavior of skills performed independently
- repeat this process until all duties are being performed under natural work site conditions

3.4 Implement Process of Fading from the Job Site

- discuss the fading schedule with the employer
- mutually agree on a day to begin
- inform the employee you are leaving the work site
- leave for no more than 1/2 day the first time
- continue to collect data
- continue fading your presence as long as the employee continues to perform all duties at company standards

From Barcus, Brooke, Inge, Moon and Goodall (1987)

Supported Competitive Employment Training

Goal 5

Table V.4

Advocacy

4.1 Explain the capabilities of workers to employers and coworkers

4.2 Counsel parents/guardians on benefits and disincentives to employment

4.3 Explain the job benefit package to the worker and her or his family/guardian

4.4 Establish rapport with supervisors and coworkers

4.5 Never allow job training to interfere with the flow of business or the established work schedule

4.6 Involve supervisors or coworkers in the training, if feasible

4.7 Recognize employers, supervisors, and coworkers who promote the employment of citizens with disabilities

4.8 Encourage coworkers to socialize with the new worker

4.9 Model appropriate interactions with the worker

4.10 Work out job modification if needed

4.11 Keep the family/guardian aware of the worker's performance

4.12 Assist families with SSA, etc.

Adapted from Moon, Goodall, Barcus and Brooke (1986)

Supported Competitive Employment Training

Goal 5

Activity V.1

Completing a Task Analysis

Purpose of the Activity: to enable participants to write a task analysis of a job or part of a job

Target Audience: Professionals (up to 25 people)

Length of Time Required for Activity: 1 1/2 - 2 1/2 hrs.

Materials:
- pencils/pens
- Task Analysis Form
- chart paper/flip chart
- marker(s)

Summary of Activity: A major task that employment specialists must master is the ability to break down job duties or related non-vocational tasks into teachable steps. This requires the employment specialist to define a major duty or task and identify the required skills (steps) and the performance sequence necessary to correctly perform the designated activity.

For this activity, the trainer should divide the participants into "working" pairs and assign each pair a specific skill or task to analyze (e.g., street crossing, walking from the training area to another designated area, buying a snack from a vending machine, etc.). The working pairs must develop a written task analysis (TA) of the assigned skill. Give them 45 minutes to go into the community and task analyze the skill.

Upon returning to the training site, the trainer and participants should discuss the TAs: Is each step written like a verbal prompt? Does the TA begin and end the task? Are the steps of comparable size? The trainer should then assign sets (two groups) of working pairs to return together to their assigned locations. Working pair A should give their TA to working pair B. Working pair B should perform the task as written, and recommend any changes they see necessary. Working pair B should give the TA they develop to working pair A and complete the same process. Then the groups should return to the training site and review their findings with each other.

Once all the sets (two groups) have returned to the training site and have had an opportunity to review their findings, the trainer should facilitate large group discussion regarding the experience and attempt to get the groups to generate a list of guidelines to follow when developing a task analysis.

*** To continue this activity and prepare for the following activity, each pair of participants may spend an additional 45 minutes - 1 hour task analyzing a job in a pre-identified job site. ***

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Task Analytic Recording Sheet

Trainer: ______
Trainee: ______
Environment: ______
Instructional Cue: ______

Program

Total time for session
Total correct steps
Percent correct steps

Code: + = independent/correct
- = incorrect
V = verbal prompt
M = model prompt
P = physical prompt

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Supported Competitive Employment Training

Goal 5

Activity V.2

Utilization of Prompting Strategies

Purpose of the Activity: to have participants develop a working knowledge of the use of training prompts

Target Audience: Professionals (no more than 4 participants to a job site at one time in pairs of two)

Length of Time Required for Activity: 3 hrs. - 3 1/2 hrs.

Materials:
- access to one job for each pair of participants (more than one job may be observed in large sites)
- qualified employment specialist or inservice trainer available to supervise participants
- task analyses for each job site (see previous activity)

Summary of Activity: During initial skill acquisition, it is critical that the employment specialist provide the necessary assistance to assure workers learn job duties correctly from the first day of work. One way to provide only the assistance necessary to encourage work independence is through the use of the system of least intrusive prompts. This method, in which a verbal, model or physical prompt is provided for each incorrectly performed step of a task, allows for completion of a task from beginning to end, regardless of the amount of assistance required. The system also allows natural fading of training assistance as the worker becomes more proficient.

The trainer should assign 2 participants to a job site, preferably under the supervision of an experienced employment specialist. Using the TA for the job site, participants A and B should observe the employment specialist implementing training using the system of least intrusive prompts. The trainer should then assign participant A to work with the consumer on training a specific skill using the system of least intrusive prompts, and participant B should record prompt data. The employment specialist should provide feedback during and upon completion of the training session. Then the participants should switch roles (participant B train, participant A record data). This process should be repeated throughout the training session, with open analysis of the training being facilitated by the employment specialist and/or inservice trainer.

*** Refer to Table II.8, pages 188-189, for more information on systematic instruction and the system of least intrusive prompts. Also, the trainer may wish to refer to Barcus, Brooke, Inge, Moon, & Goodall (1987) and Small (1983) for more information on job site training and systematic instruction. ***

Supported Competitive Employment Training

Goal 5

Activity V.3

Problem-Solving Job Site Situations

Purpose of the Activity: to have participants problem solve job site training issues and apply training strategies to address the issues.

Target Audience: Professionals (up to 15 people)

Length of Time Required for Activity: 45-60 minutes

Materials:
- list of real training problems/situations
- chart paper/flip chart
- marker(s)

Summary of the Activity: The employment specialist will be required to solve many situations that can and will arise during the training process. Whether or not the worker remains employed often hinges on the employment specialist's ability to identify potential problem situations, analyze the situation, and prescribe an appropriate course of action to resolve the situation. Frequently, this action must be taken quickly without the chance to consult with other professionals or resources.

In this activity, the inservice trainer should assign each participant one of the six problem situations and the participants should individually develop strategies they view as appropriate for the situation. Participants should be given five minutes to develop their strategies.

Next, the trainer should request all participants to get into groups based on the assigned problems. (All persons assigned the same problem should form a group). The group should then list strategies they feel may be appropriate for the situation. (They should generate a list that represents various group members' strategies). At the end of 15 minutes, the trainer should facilitate a discussion by all participants about each problem situation and generate a list of strategies which should be typed and distributed to the participants before the end of the training. The trainer, throughout the discussion, should point out that there is no one right answer, but instead there may be several correct solutions when you take into account the situation, the personalities of employment specialists and employees, and the characteristics of the work environment.

* If participants have previous experience with job site training and/or are currently working as employment specialists, it is advisable to have them generate a list of job site training problems instead of using the problems included here.

Job Site Training Situations

1. An employee with severe mental retardation has been working for four months in a shopping mall maintenance position. He has reached acquisition on all phases of the job, but the quality of his work deteriorates significantly when the "job coach" fades off the job site for more than two entire days in a row. The supervisor reports that he "gets off task and looks out the windows".

2. An employee with mild mental retardation has been working as a dishwasher for three weeks. Although the quality and production rate of his work are excellent, he has difficulty getting to work on time and getting started with his job as soon as he has "punched in".

3. An employee with moderate mental retardation is employed as a maid in a national hotel chain. She has been working there for five weeks. Although her probe and training data reflect continual learning and progress on most parts of the job, she continues to have difficulty remembering the sequence of steps in each of the tasks. For example, she often "forgets" to clean the bathroom mirror or starts vacuuming the room before she has made the bed.

4. An employee with cerebral palsy, employed as an office clerk, has difficulty alphabetizing files because of a mild learning disability. Ninety percent of her work is accurate, but she frequently confuses "M's" and "N's" and "Mc's" and Mac's".

5. An employee with moderate mental retardation is employed in a shopping mall maintenance position where she has a great deal of contact with the public. She is capable of speaking in 2-3 word phrases, but when she doesn't understand a question or comment, she shrugs her shoulders and walks away. Shoppers in the mall most frequently ask her, "What time does the mall open?" and "What time is it?" Her supervisor wishes her to respond more appropriately to the public.

6. An employee with a closed head injury has been working for three weeks as an office clerk. He has continually shown progress in learning his job and reaching required production rates. However, in the past four days, he has become frustrated and angry with the employment specialist when she tries to correct his mistakes. When he becomes angry, his production rate and work quality decline for about 15 minutes until he has calmed himself down.

Goal 6: Ongoing Assessment and Follow-Along Components of the Supported Work Model

In the supported work model, ongoing assessment of a worker's performance begins as soon as she or he is hired for a position and job site training is begun. Methods of ongoing assessment that are conducted during job site training and after the employment specialist fades from the job site include: employee evaluations, progress reports, parent/guardian questionnaires, on-site visits and telephone contacts.

The inservice trainer needs to address the use of each of these mechanisms and to assist participants with developing a schedule for use with their agency or organization's consumers.

Supported Competitive Employment Training

Goal 6

Table VI.1

Ongoing Assessment and Follow Along

1.1 Employee Evaluations

- Help employers understand the purpose of the employee evaluation
- Make the process convenient
- Make the process personal
- Continue to collect the evaluations at the appropriate intervals unless the employer requests otherwise

1.2 Progress Reports

- Information from each employer evaluation should be compiled by the employment specialist into a progress report which is shared with the worker and her or his family/guardian
- The progress report should accurately reflect the employer's evaluation of the worker's performance
- Positive aspects of the worker's performance should always be indicated so that family/support person can reinforce the worker
- Suggestions for strategies that could be used by family members should be included

1.3 Parent/Guardian Questionnaire

- Should be given to the family at the same time as the progress report
- Provides the employment specialist with information regarding the worker's home situation and changes in the home setting

1.4 Onsite Visits

- Onsite visits maintain personal contact and rapport with supervisors, coworkers, and the worker
- Enables direct observation of work performance
- Elicits useful information about the worker's performance

1.5 Telephone Contacts

- Visits (onsite) are not always feasible or necessary
- Some employers communicate more candidly about a worker's performance over the phone
- Good way to establish and maintain communications with parents, etc.

1.6 Incident Reports

- A problem/potential problem may be uncovered through the use of one or more of the ongoing assessment methods
- The first step is to gather more detailed information on the problem/potential problem
- The employment specialist should verify and identify the nature and extent of the difficulty
- Review previous incident reports
- Develop strategies and implement intervention (where necessary)
- Collect data and fade employment specialist's presence

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Supported Competitive Employment Training

Goal 6

Activity VI.1

Problem Solving Follow Along Situations

Purpose of the Activity: to have the participants problem solve and identify strategies to utilize for follow-up situations

Target Audience: Professionals

Length of Time Required for Activity: 45-60 minutes

Materials:
- list of real situations
- flip chart/chart paper
- marker(s)

Summary of Activity: The solution to problem/potential problem situations may be as simple as a single conversation with the worker and/or his or her family or employer, or can be as complicated as needing a sophisticated systematic instruction program to address the situation. Regardless of the degree of the situation, the employment specialist must be prepared to provide job site intervention or counseling until the employer is comfortable that there has been a satisfactory resolution of the situation.

In this activity the trainer should divide the participants into groups of two to three participants and assign each group a specific (real situation) incident for which the group must recommend strategies/ techniques appropriate for addressing the incident. Each group should be assigned a different problem. After fifteen minutes of small group

Goal 7: Program Management

There are many issues which need to be addressed when managing a supported employment program. In this section we are going to focus on three which are especially critical to management of the supported work model of competitive employment: employment specialist time management, employment specialist competencies, and program funding. These are not the only areas of concern to program managers, but they are three commonly voiced concerns. An inservice trainer must carefully analyze the needs of his or her participants, as suggested in Section I, and plan workshop material which enables participants to meet their immediate needs.

Supported Competitive Employment Training

Goal 7

Table VII.1

Employment Specialist Time Management

1.1 Time Management

Intervention Time Directly Related to Job Skills Training

- time active
- time inactive

Intervention Time Indirectly Related to Job Skills Training

- travel/transport time
- consumer training time (other than directly related job skills)
- consumer program development
- employment advocacy time
- non-employment advocacy time
- consumer screening/evaluation

1.2 Staff/Consumer Ratio

- numbers of staff required to start a program
- feasible caseload during the first year
- feasible caseload longterm

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Table VII.2

Philosophical Mindset of Employment Specialists

2.1 Individuals with severe disabilities deserve an opportunity to work in integrated settings and earn a decent wage

2.2 Normalization

2.3 Integration

2.4 Wages

2.5 Dignity of Risk

2.6 Quality of Life

2.7 Rights

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Goal 7

Table VII.3

The Employment Specialist: A Critical Part of Supported Work Approach to Competitive Employment

Key Work and Personal Characteristics

3.1 Actively involved in initial placement arrangements including travel training, parent counseling, etc.

3.2 Skilled at communicating with employers and coworkers; understands job analysis thoroughly.

3.3 Skilled at training consumer at job site on a daily basis.

3.4 Skilled at communicating with referring rehabilitation counselor, social security, and parents.

3.5 Flexible; highly persistent; patient; motivated to work with difficult consumers; able to work unusual hours; walks on water.

Is there a difference between the traditional placement specialist and the employment specialist? Yes! The employment specialist uses place, train, and follow-along--not place and pray.

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Goal 7

Activity VII.1

Staffing Patterns

Purpose of the Activity: to have participants discuss staffing patterns for supported competitive employment programs

Target Audience: Professionals

Length of Time Required for Activity: 15-30 minutes

Materials:
- chart paper/flip chart
- marker(s)

Summary of Activity: The trainer should facilitate discussion regarding the "+'s" and "- 's" of a staffing pattern in which the employment specialist performs all aspects of the model. The trainer should solicit "+'s" from the group and encourage discussion. Once "+'s" have been listed, discussion should be focused on identifying the "-'s" to this type of staffing pattern.

The trainer should then facilitate discussion regarding splitting the job responsiblities into: a) job development position and b) job trainer position. The trainer should solicity "+'s" of this staffing pattern from participants and then solicit "-'s".

The "+'s" and "-'s" of each staffing pattern should be typed and disseminated to the participants.

Supported Competitive Employment Training

Goal 7

Activity VII.2

Employment Specialist Role:
Fact or Myth

Purpose of the Activity: to have the participants discuss misconceptions regarding employment specialists

Target Audience: Professionals (15-25)

Length of Time Required for Activity: 30-45 minutes

Materials: . list of myths and facts

Summary of Activity: If the group is small (10-12), the trainer should provide each participant with a list of questions which may be myth or fact. The trainer should begin with the first question, and facilitate discussion on the question. The trainer should then facilitate discussion on each of the remaining questions listed.

If the group is larger, divide the participants into small groups (4-6 participants) and assign each group specific questions to respond to. Have the groups discuss their assigned questions and develop responses for 10-15 minutes. At the end of that time, each group should read their quesitons and provide the group's consensus response. The trainer should encourage other participants to respond to the group. All the groups should have an opportunity to present/discuss their assigned questions.

Supported Competitive Employment Training

Goal 7

Table VII.7

Making a Supported Work Approach to Competitive Employment Work

7.1 Four Key Components

- The Job Coach, Who Is the Service Provider--can be affiliated with rehabilitation facilities, day programs, schools, etc.
- The Rehabilitation Counselor Who Refers Clients and Purchases Service--clients traditionally excluded from services must be referred.
- A Mechanism for Funding Job Placement and Job Site Training--fee-for-service through use of vocational training, on-the-job training, and/or post-employment funds; pay on hourly basis.
- A Mechanism for Funding Follow-Along Services.

7.2 How Can A Supported Work Approach To Competitive Employment Be Funded?

- Rehabilitation Funds - Case Service Dollars.
- Rehabilitation Funds - Federal/State Discretionary Grants
- Developmental Disabilities Funds - Federal/State Start-Up Grant
- Local County Human Service Dollars
- Joint Training and Partnership Act Funds - Private Industry Councils
- Reallocate Currently Existing Resources and Positions to Higher Priority Activities
- Cooperative and Regional Allocation of Resources

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Goal 7

Table VII.8

What Are the Funding Sources for the Different Phases of Supported Employment?

PHASES

Hire/Redistribute staff/Communicate/
Negotiate with Related Agencies
Goal: Establish new services expand
CHOICES/OPTIONS for consumers

Initial Time Limited Service
Develop job sites, provide transitional,
time-limited services
Goal: Increase community integrated
time-limited, transitional services

Ongoing follow along/advocacy
Maintain/Advance consumers at job sites
in community
Goal: Increase Net Income
Increase the number of consumers
working and living in the least
restrictive environment

SOURCES

FEDERAL: Funds for Source
- DOE:
  - OSERS
  - NIDRR
  - VOC AND ADULT ED
- HHS:
  - DD
  - SSA-SSI/SSDI
  - MEDICAID/CARE
- DOL:
  - JTPA
  - TJTC

STATE: Funds for Source
- VR
- DD
- DMHMR
- Legislators
- DOE
- EC-TJTC

LOCAL: Funds for Source
- DMHMR
- VR
- DD
- CSB
- DOE

PRIVATE: Funds for Source
- Foundations
- UGF
- Goodwill
- Salvation Army
- Corporations
- Individuals

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Supported Competitive Employment Training

Goal 7

Activity VII.3

Funding a Local Program

Purpose of the Activity: to have participants discuss potential funding strategies within their community(ies)

Target Audience: Professionals and parents

Length of Time Required for Activity: 45-60 minutes

Materials:
- paper
- pens/pencils

Summary of Activity: The trainer should have participants divide into small groups (5-8 persons) based on the communities represented in the overall group. The groups should discuss/list potential funding sources immediately available and sources that could be approached in the future for funding each phase of the placement process. For areas where funding is not immediately available, the group should outline possible strategies for obtaining funding. Give the groups 20-30 minutes for discussion time. The trainer should facilitate the participants in a large group discussion of the results of their small group discussions.

References and Resources for Supported Competitive Employment Training

The following references and resources may be useful to staff trainers in increasing their knowledge of the supported work model of competitive employment and other models of supported employment. Several of the resources listed below also contain sample training materiasls and activities which may be combined with the sample materials in this manual and adapted to the needs of individual trainers and their targeted participants.

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Project TIE
Virginia Commonwealth University School of Education
Richmond, Virginia

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